

BEFORE THE BOARD OF COUNTY COMMISSIONERS  
FOR MULTNOMAH COUNTY, OREGON

**RESOLUTION NO. 01-011**

Approving the Multnomah and Washington County Regional Investment Plan

**The Multnomah County Board of Commissioners Finds:**

- a) The Regional Investment Plan (Plan) of the Multnomah-Washington Regional Investment Board meets the community and economic development criteria established by the Oregon Rural Investment and Regional Investment Program.
- b) The Plan is consistent with the County's benchmark for reducing poverty and the County's goals for workforce development and sustainability.
- c) The County, and particularly distressed communities within the County, will benefit greatly from the implementation of the Plan.

**The Multnomah County Board of Commissioners Resolves:**

- 1. The Board approves the Multnomah-Washington Regional Investment Board's Regional Investment Plan.

ADOPTED this 25th day of January 2001.



BOARD OF COUNTY COMMISSIONERS  
FOR MULTNOMAH COUNTY, OREGON

  
Beverly Stein, Chair

REVIEWED:

THOMAS SPONSLE, COUNTY ATTORNEY  
FOR MULTNOMAH COUNTY, OREGON

By

  
Thomas Sponsler, County Attorney

# **Multnomah & Washington County Regional Investment Plan**

---

**Prepared by the  
Multnomah-Washington County Regional Investment Board**

With assistance from the  
Institute of Portland Metropolitan Studies  
College of Urban and Public Affairs  
Portland State University

**Prepared for  
the Counties of Multnomah and Washington, their citizens, Oregon  
Economic and Community Development Department, Oregon State  
Legislature, The Governor of the State of Oregon**

**January 26, 2001**

## **Table of Contents**

<b>1. Executive Summary.....</b>	<b>3</b>
<b>2. Background: What is the purpose of the Regional Investment Plan?.....</b>	<b>5</b>
<b>3. Regional Investment Board Members .....</b>	<b>6</b>
<b>4. Resource Analysis: What do we know about the region?.....</b>	<b>7</b>
<b>5. Needs &amp; Barriers.....</b>	<b>20</b>
<b>6. The Regional Investment Strategic Framework.....</b>	<b>22</b>
<b>7. Implementation .....</b>	<b>26</b>
<b>8. Rural Action Plan .....</b>	<b>28</b>
<b>9. Disadvantaged / Minority Involvement .....</b>	<b>28</b>
<b>10. Evaluation.....</b>	<b>29</b>
<b>11. Management.....</b>	<b>31</b>
<b>12. First-Source Hiring Agreements for “Benefited Businesses” .....</b>	<b>31</b>
<b>13. Appendices .....</b>	<b>32</b>

## 1. Executive Summary

The Portland economy has grown consistently for a decade and a half, outperforming the nation. Population, wages, and personal incomes have risen while the economy has evolved from a singular reliance on natural resources to an increasingly diversified mix of knowledge-based and traditional industries. Today we no longer rely solely on drawing a living from the land, but also trade on the products and services created by skilled people attracted to our community and its natural and built environments. These skilled people, attached to this special place, have allowed us to develop distinctive competencies that manifest themselves in certain industry clusters that are the driving force behind the regional economy.

Both Multnomah and Washington Counties have benefited from the successful economy in similar ways. Thriving in the new global economy, their growth in population and employment has been sustained by a rich and increasingly diversified job base. This economic diversification has its roots in the growth of clusters of knowledge-based high technology industries. However, the region has also continued to support traditional strengths in natural resource and manufacturing industries, with one major difference: Like their counterparts in high technology, these industries are increasingly reliant on the expertise of their workforce to establish themselves as innovative economic competitors.

Notwithstanding the positive changes of the past decade, our economic growth has presented us with a central unresolved paradox that raises concerns over our ability to maintain and continue to improve our quality of life. The benefits of economic growth have not been enjoyed evenly across the region's increasingly diverse population. Not only has the regional economy failed to produce enough family-wage jobs, but persistent problems with poverty remain a fact in the region as well. In response, the development of skills and expertise in all parts of the population, especially in distressed communities, is critical to future economic success. Placing this economic change in context, the Regional Investment Board concludes that

- ⇒ *Our economy is doing well*
- ⇒ *Our counties are job-rich*
- ⇒ *Our population is becoming more diverse*
- ⇒ *We still face pockets of poverty and there are communities that have not shared in the benefits of a growing regional economy*
- ⇒ *Knowledge, skills, and expertise are the keys to our future economic success*

These statements highlight the fundamental connections between people, places, and industry clusters in driving the regional economy. The centrality of these three themes has guided the Regional Investment Board in the development of the Regional Investment Plan and a strategy for funding projects. To that end:

- ⇒ ***The mission of the Regional Investment Board is to develop and implement a plan that will help sustain the ongoing evolution of our regional economy by increasing the capacity of all people to participate in and benefit from our economic growth, catalyzing efforts to ensure that all communities are great places to live and do business, and fostering vital, innovative industry clusters.***



**To achieve this mission, the Regional Investment Plan will focus on three goals:**

**□ People**

---

Increase the capacity of all people to participate in and benefit from economic growth by improving **worker skills**, providing pathways to **entrepreneurship**, and enhancing **life-long learning opportunities**.

**□ Places**

---

Ensure that all **communities** are great places to live and do business, have adequate and high quality **public infrastructure**, and sustain **environmental quality**. In considering these issues, the Board will pay special attention to the **needs of distressed communities**.

**□ Clusters**

---

Foster vital, innovative **industry clusters** by meeting the physical needs of industry, promoting cluster relationships, and supporting efforts to improve global competitiveness and enhance innovative capacity. Regional clusters currently include high tech, creative services, metals/machinery/transportation equipment, nursery products, specialty foods/craft beverages, and lumber and wood products.

## **2. Background: What is the purpose of the Regional Investment Plan?**

The Regional Investment Plan charts the means by which the Multnomah-Washington County Regional Investment Board (RIB) will implement the Rural Investment and Regional Investment Programs in accordance with ORS 285B.230 to ORS 285B.263 and ORS 285B.269, as amended by Senate Bill 1128, and OAR 123-044-0000 to 123-044-0090 and OAR 123-045-0000 through 123-045-0060.

The purpose of Oregon's economic development strategy, outlined in the legislation above, is to promote the improvement of Oregon's economy to better provide for the well-being of its citizens. Advancing those goals, the Multnomah-Washington Regional Investment Plan is intended to provide a strategy through which the Board can make investments in the Region's economic and community development priorities and as a means for ensuring that investments yield the intended results. More than a list of projects, the Plan is expected to provide guidance for the Board and other decisionmakers seeking to advance regional priorities consistently and effectively.

In addition, this strategy directly ties into the state's economic strategy (SB 1128) which addresses the following priorities:

- ❑ Focusing on Oregonians in communities that are rural, economically distressed or lack diverse employment opportunities, including providing assistance in recruiting jobs from outside the community or state and financing necessary infrastructure;
- ❑ Assisting Oregonians who are unemployed or in low-income jobs;
- ❑ Assisting start-up companies and companies already doing business in Oregon; and
- ❑ Helping regions that are committed to making a strong progress toward an integrated structure and process for strategic planning and project development

Towards those ends, the Plan includes criteria for making investments and the basis upon which program impact and regional performance will be judged. The Plan is intended to be a dynamic document, evolving as conditions change and assumptions get tested. The Regional Investment Board is the body that will develop the plan and monitor its performance. Upon initial adoption of the Plan, and taking action through the process the Plan establishes to make both Regional and Rural investments, the Board will continue to review and refine the plan in consultation with citizens, cities and counties, public agencies, civic and business organizations, and other interested parties.

**3. Regional Investment Board Members**

	<b>Name</b>	<b>Organization</b>	<b>Phone Number</b>	<b>Fax</b>	<b>Address</b>	<b>E-mail</b>
<b>Multnomah County</b>	John Ball	Worksystems inc.	241-4600	241-4622	711 SW Alder Suite 200 Portland, OR 97205	Jball@worksystems.org
	Bud Caverly	Dupont Photomasks	674-2330 x3001	674-2336	23932 NE Glisan St. Gresham, OR 97030	Bud.caverly@photomask.com
	Bertha Ferran	Hispanic Chamber of Commerce	464-9215	297-6684	3761 SW 58th Dr Portland, OR 97221	Locoloco23@aol.com
	Roy Jay	Oregon Business Network	244-5794 x45	293-2094	516 SE Morrison Suite 650 Portland, OR 97214	Royjay1@aol.com
	Robert McKean	President, Albina Community Bank	288-7280	282-4691	2002 NE Martin Luther King Jr. Blv, Portland OR 97212	Rmckean@albinabank.com
	Rod Park	Metro	797-1547	797-1793	2100 SE 282nd Ave. Gresham, OR 97080	Parkr@metro.dst.or.us
<b>Washington County</b>	Betty Atteberry	Director, Westside Economic Alliance	968-3100	624-0641	10200 NW Nimbus Ave G-3 Portland, OR 97223	Batteberry@westside- alliance.org
	Doug Marshall	Morgan, Cox & Slater Ltd.	517-0381	223-2011	5350 NW Edgebrook Place Portland, OR 97229	Marshall@morgancox.com
	Jack Orchard	Ball Janik LLP	228-2525	295-1058	101 SW Main St. Suite 1100 Portland, OR 97204	Jorchard@bjllp.com
	Judson Randall	County Planning Commission Chair	725-5687	293-0166	6601 SW Pine St. Tigard, OR 97223	Jud@europa.com
	Bob Terry	Fisher Farms	985-7561	985-3518	9650 SW Hardebeck Rd Gaston, OR 97119	Bob@fisherfarms.com
	Janet Young	City of Beaverton	526-2456	526-2479	P.O. Box 4755 Beaverton OR 97076- 4755	Jyoung@ci.beaverton.or.us
<b>Staffing</b>	Ethan Seltzer, Director Graduate Assistants: Heike Mayer John Provo	Institute of Portland Metropolitan Studies	725-5170	725-5199	P.O. Box 751 Portland, OR 97207- 0751	Seltzere@pdx.edu  Mayerhe@irn.pdx.edu Provoj@pdx.edu
<b>Fiscal Agent</b>	Portland Development Commission (PDC)	Larry Pederson	823-3251	823-3368	1900 SW Fourth Suite 7000 Portland, OR 97201	Lpederson@portlanddev.org



#### **4. Resource Analysis: What do we know about the region?**

*Shaped by the growth of industry clusters and the region's diversification into skill- and knowledge-based industries, Portland's successful economic performance has great significance for the communities that make up the region. The following analysis of what we earn and learn, where we live and work, how we travel, and in the end what we value as a community guides the Regional Investment Strategy.*

##### **□ People**

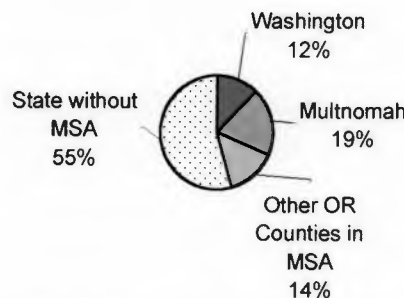
*The positive economic changes of the last decade are reflected in the region's burgeoning population. Further, by many measures we are better educated and better off than has ever been the case. That said, the benefits of this economic growth have not been enjoyed evenly across the region's increasingly diverse population. The regional economy has not produced enough family-wage jobs, and faces persistent problems with poverty.*

##### **Who lives here?**

The region's population has changed substantially over the past decade. Growth is projected to continue, largely through in-migration, resulting in significant differences that should be anticipated by the Regional Investment Plan. These include decreases in the numbers of young adults and school-aged children, as well as an increase in the region's ethnic diversity.

Population has steadily increased over the 1990's, and is projected to surpass two million by 2010. Washington County was the fastest growing county on the Oregon side of the region, adding 73,000 residents between 1990 and 1997, for an increase of 23 percent. Multnomah County also grew, adding 55,000 residents during the same period, although its 9 percent growth rate was the slowest in the metropolitan region. In 1998, Multnomah and Washington Counties' total population was 1,031,288 people. This amounts to one-third of the state's population of 3,282,055.

Chart 2: Metro Share of State Population, 1998



Source: Regional Economic Information System, Bureau of Economic Analysis

Natural increase in population (the difference between births and deaths) contributed to about 31 percent of the region's growth. The area's overall population increase of 264,000 between 1990 and 1997 was composed of a natural increase of 84,000 and estimated net in migration of 180,000.

As represented below, the region's population is projected to include fewer school-age children (ages 5-17), who should move from 19.9 percent of the population in 1995 to 18.4 percent of the



population in 2010. Further decreases are projected in the numbers of young adults (ages 18-24), who should drop from 10.3 percent of the population in 1995 to 9.8 percent in 2010. Only the share of working age adults (age 25-64) is projected to increase, growing from 57.4 percent of the region's population in 1995 to 59.7 percent in 2010.

Table 7: Age composition

	1995	2000	2005	2010
School age (5-17)	19.9	19.3	18.8	18.4
Young adults (18-24)	10.3	10.5	10.2	9.8
Working age (25-64)	57.4	58.5	59.6	59.7
Elderly (65+)	12.3	11.7	11.4	12.2

Source: IMS Metro Briefing Book 1999

While the region's population is relatively homogenous compared to other major U.S. cities, the minority population has risen dramatically in the last decade, from 139,890 persons in 1990 to 200,020 persons in 1997. This has been driven by large increases in the region's Hispanic population, which grew from 44,733 in 1990 to 77,100 in 1997, a 72 percent increase. Also contributing were a 42 percent increase in the region's Asian population from 46,644 in 1990 to 66,200 in 1997 and a 22 percent increase in the region's African-American population from 36,186 to 47,200 in 1997.

Table 8: Ethnic Composition

	1990	1997	Percent Increase
Overall population	139,890	200,020	43
Hispanic	44,733	77,100	72
Asian	46,644	66,200	42
African American	36,186	47,200	22

Source: Institute of Portland Metropolitan Studies: Metro Briefing Book, 1999

Issues such as education and workforce training are greatly affected by changes in the age makeup and ethnic diversity of the region. Thus, as growth and increasing diversity continue, the changing composition of Metropolitan Portland's population is of great significance to the Regional Investment Plan.

### What do we earn?

While the region has seen increases in employment over the past decade, the Regional Investment Plan should be concerned not only with the quantity of jobs, but with their quality. Incomes and wages have risen generally at a faster rate than the nation as a whole, indicating the benefits that have accrued to the region from growth in industries relying on the skill and expertise of workers. However, data on average occupational wages and poverty indicate that not everyone was able to share in the regional economic success.

Historically, the Portland metropolitan area has enjoyed a per capita income somewhat higher than the U.S. average. In fact, the region's per capita income has risen from a little over \$4,000 per year in the late 1960s to more than \$27,388 in 1997. Except for the years 1980 to 1982, real incomes have risen from year to year, indicating a steadily improving standard of living. Adjusted for inflation, Portland residents have about \$10,000 more in income than in the late 1960s. Compared to the nation, Portland's per capita income has risen by 4.8 percent between 1990 and 1997.

Income distribution data from the 1990 Census also shows that Portland's income is much more evenly distributed than is national income. For example, in 1990, 4 percent of all U.S. families and 2.5 percent of all Portland metro families had incomes of less than \$ 5,000 per year. The data shows that Portland had a smaller fraction than the nation of families earning less than \$15,000 per year, a level just above the \$13,359 poverty threshold for a family of four. The region also had a smaller fraction of its families earning more than \$75,000 per year. As a result, a larger fraction of Portland families are found in the middle income categories. The following table shows the fraction of the Portland and U.S. families in low, middle and high-income groups.

*Table 9: U.S. and Portland MSA Families, by Income Category, 1990*

Family Income Category	U.S.	Portland MSA
Less than \$5,000	4.0%	2.5%
\$5,000 to \$9,999	5.6%	4.2%
\$10,000 to 14,999	7.2%	5.8%
\$15,000 to \$24,999	16.4%	16.1%
\$25,000 to \$34,999	16.5%	18.1%
\$35,000 to \$49,999	20.4%	23.3%
\$50,000 to \$74,999	18.2%	19.6%
\$75,000 to \$99,999	6.3%	5.8%
\$100,000 or more	5.4%	4.7%

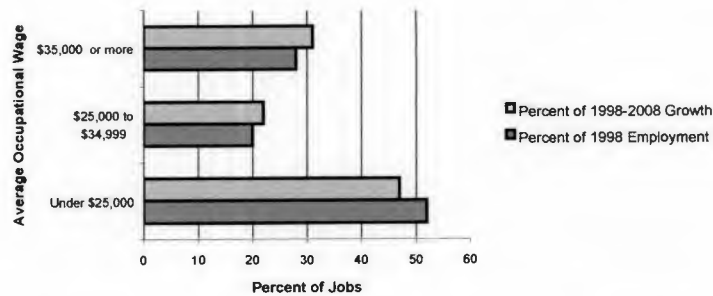
*Source: 1990 Census of Population and Housing*

Like income, average wages have risen steadily in the region, from about \$15,200 per worker in 1980 to about \$29,900 per worker in 1996. While this seems like an impressive gain, much of the increase is due to inflation. Stated in inflation adjusted dollars, wages per worker in the metro area are up only slightly over this time period, from about \$29,300 in 1980 to \$30,500 in 1996, an increase of just \$1,200 per worker, or about 4 percent (amounts expressed in chained 1997 dollars).

As for the distribution of those wages, the Bureau of Labor Statistics completed a survey in 1997 which provided the following data: About 10 percent of all workers earned less than \$7.30 per hour, and only about 10 percent of all workers earned more than \$27.14 per hour. Half of all workers earned between \$9.50 per hour and \$19.65 per hour.

Placing that broad range in perspective, the Oregon Employment Department surveys average wage levels by occupation. In 1998, they found that 52 percent of all jobs in the Portland metropolitan area are in occupations with average wage levels of less than \$25,000 per year. On the opposite extreme only 28 percent of the region's work force was employed in high wage occupations earning on average \$35,000 or more. However, their forecasts through 2008 project a higher percentage of the region's new jobs will be in higher wage categories.

Chart 3: Jobs by Average Occupational Wage



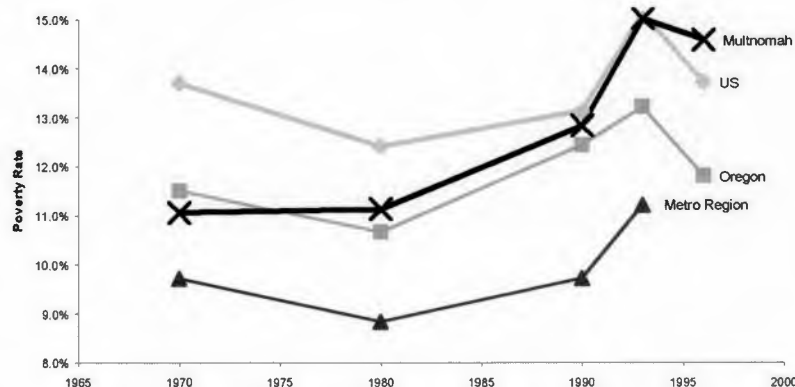
Source: Oregon Employment Department, 1999 Regional Economic Profile

Poverty rates for the nation and metropolitan region since 1970 indicate that the incidence of poverty in the region has been consistently lower. As indicated in Chart 4, U.S. rates of poverty have ranges from 13.7 percent in 1970, down to 12.4 percent in 1980 and rising to 13.1 percent in 1990. Figures for the Metropolitan Region went from 9.7 percent in 1970 to a low of 8.8 percent in 1980, rising again to 9.7 percent in 1990.

Most recent estimates from the U.S. Census Bureau (Current Population Survey) indicate that rates remain low, with 1995 figures ranging across the region from 7.1 percent in Washington County and 6.8 percent in Clark County, Washington.

The exception in the region is Multnomah County, which at 13.5 percent is the only jurisdiction with higher rates than the 12.5 percent statewide figure. Further data, compiled at the tract level for Multnomah County by the Census Bureau's American Community Survey, suggests that despite positive job growth, the incidence of

Chart 4: Poverty Rate 1970 - 1996



Source: 1970, 1980, 1990 Census Data, American Community Survey, March 1997 Current Population Survey

poverty in Multnomah County remains high at 14.1 percent. This concentration of poverty is highest in North-Northeast Portland, with 10 percent of the county's population and 22 percent of poverty, and Outer Southeast Portland with six percent of population and 18 percent of poverty in the county.



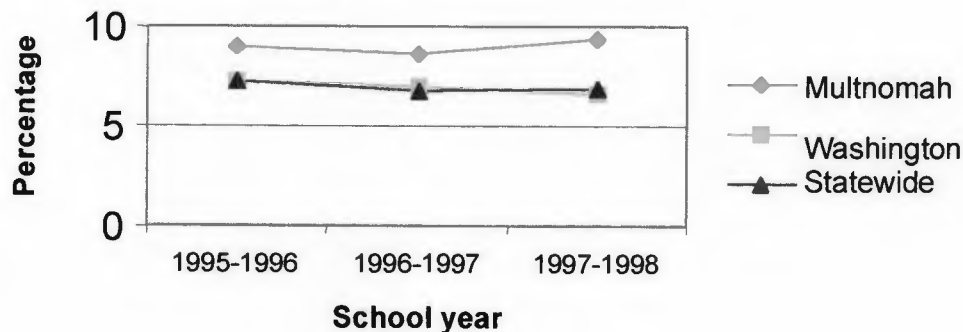
### What do we know?

The disparity suggested by the juxtaposition of rising per capita incomes, low average occupational wages and persistent pockets of poverty is echoed in an examination of statistics on educational attainment and outcomes in the region. The metropolitan region's population is one of the nation's best educated, far ahead in the number of individuals holding at least four-year college degrees. However, results in secondary education are mixed, with high school drop out rates rising. This difference in educational outcomes indicates that sustaining future high levels of educational attainment should be a great concern of the Regional Investment Plan.

One-third of metropolitan Portland's adult population has at least a four-year college degree, ranking the region among the ten best-educated large metropolitan areas. Educational attainment in the region, always somewhat above the national average, has improved dramatically in the 1990s, coincident with the region's high tech boom and the in-migration of many well-educated new residents. In fact, the Oregon Employment Department estimates that about 50 percent of interstate migrants to Oregon who settle in the Portland metropolitan area have at least a four-year college degree. Further the American Electronics Association estimates that 54 percent of Oregon high tech employees have a four-year degree or greater level of education.

At the same time rates of higher education attainment were climbing, the high school drop out rates in Multnomah and Washington Counties have either been on par or have exceeded state figures. In fact, Multnomah County has consistently had one of the highest rates in the state, averaging 9 percent between the 1995-1998 school years. As outlined in Chart 5 below, Washington County's rates have been closer to statewide figures, with an average of 7 percent of student's in grades 7-12 dropping out between the 1995 and 1998 school years compared to the statewide figure of 6.9 percent. Even so, both counties lead the state in this measure, with Multnomah's rate third highest and Washington thirteenth out of Oregon's 36 counties.

*Chart 5: Drop-out rates for Multnomah County, Washington County, and the State of Oregon*



Source: Oregon Progress Board, 1999 County Data Book



## □ Places

*Economic success and population growth has turned attention to the maintenance and improvement of the region's quality of life as a key to ensuring that all communities are great places to live and do business. We increasingly live and work on a regional scale and our successful economic performance has not benefited all of the communities that make up the region. There are still areas of need and pockets of poverty that manifest themselves both geographically in distressed communities, and in communities of interest spread across the region.*

### **Where do we work and live?**

The Regional Investment Plan, in considering both population growth and its relationship to the region's valued quality of life, should be intimately concerned with questions of how we work and live. While Portland represents a much more attractive and vibrant urban core than many U.S. center cities, the region's growth in jobs and population has become increasingly decentralized over the last decade. The resulting changes in the balance between jobs and housing throughout the region affect not only transportation costs and housing affordability, but the sense of community, the strong neighborhoods, and the environment that contribute to the quality of life that attracts both people and employers to the region.

Within the region, there are tight population and employment linkages between counties, especially the region's four most populous counties – Clackamas, Clark, Multnomah and Washington – as evidenced by commuting patterns. In 1990, more than 200,000 of the MSA's workers, about one-third of the region's workforce, worked in a different MSA county than they lived in. Because much of the region's employment remains centralized, Multnomah County is a big importer of labor from the surrounding counties. In 1990 for example, commuters from outside the County held about 40 percent of the 357,000 jobs in there. Multnomah County employers provided jobs to 82 percent of the workers living in Multnomah County, 47 percent of the workers living in Clackamas County, 36 percent of the workers living in Washington County and 28 percent of the workers living in Clark County. In fact, persons living in Clackamas County are more likely to work in Multnomah County than in Clackamas County.

The projections outlined below indicate the volume of continued residential and employment growth, particularly in suburban communities. While the projected increases vary across jurisdictions, the data shows that substantial gains in population and employment in Washington County should outpace those in occurring in Multnomah County. For example, projections for Washington County indicate an increase of 207,918 person or 49 percent and an increase in employment by 240,104 jobs, or 94 percent. Multnomah County population is projected to increase by 131,208 persons, for a 23 percent increase since 1994, while employment should grow by 201,568, for a 44 percent increase.

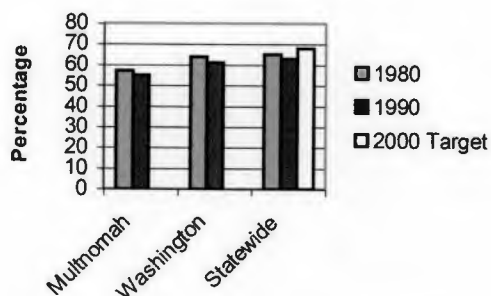
Table 10: Regional Growth

Metro/RTP Areas	Population			Employment		
	1994	2020	Projected Increase	1994	2020	Projected Increase
Multnomah County	574,694	705,902	131,208 (+23%)	454,087	655,655	201,568 (+44%)
Washington County*	424,918	632,836	207,918 (+49%)	256,246	496,350	240,104 (+94%)
Clackamas County	146,747	333,012	186,265 (+127%)	81,599	176,584	94,985 (+116%)
Clark County, WA	282,437	480,387	197,950 (+70%)	123,759	228,523	104,764 (+85%)
Rural Reserves	123,868	196,806	72,938 (+59%)	31,956	53,844	21,888 (+70%)
Total	1,552,664	2,348,943	796,279 (+51%)	947,647	1,610,956	663,309 (+70%)

Source: 2000 Regional Transportation Plan, Metro; \*Includes areas of Clackamas County west of the Willamette River

Rates of owner-occupied housing are an important measure of affordability and community stability and have suffered recent reversals. Declining from 57 percent in Multnomah and 64 percent in Washington County in 1980 to 55 and 61 percent respectively in 1990, both localities trail statewide home ownership figures of 65 percent in 1980 and 63 percent in 1990, and are below the state target of 68 percent for 2000.

Chart 6: Owner occupied housing



Source: 1999 Oregon Progress Board County Data Book

### What do we value?

With the region's population continuing to grow and change, core values and beliefs that are a part of Portland's identifiable quality of life "brand" have significance for the Regional Investment Plan. They attract and retain skilled people and sustain the growth of industry clusters. These values have found voice in public concerns dealing with sustaining community, neighborhood, the environment and quality of life in general. Recent survey research by the Institute of Portland Metropolitan Studies indicates that the protection of environmental quality and the management of regional growth are primary concerns of both the general public as well as opinion leaders.

Portland's brand of "urban environmentalism" aims to sustain communities and neighborhoods while accommodating growth and maintaining access to the region's natural resources. The Oregon Progress Board's recently released "State of the Environment Report" groups

Multnomah and Washington Counties into a larger "Eco-region" that runs the length of the Willamette Valley. Stretching from Portland to Eugene, this area contains almost 70 percent of the state's population, the majority of its industry and almost half its farmland.

Citing the Willamette Valley's role as both Oregon's agricultural heartland and home to the state's urban industrial and population centers, the report notes declines in water quality and loss of native species habitat associated with the historical loss of the Valley's natural features to urban and residential development. The Oregon Progress Board 1999 Benchmarks County Data Book also measures the impact of urban Portland on the environment, noting that increases in the average solid waste production for Multnomah and Washington County residents has grown from 1,526 pounds per year in 1990 to 1,769 per year in 1998. This exceeds the state target for year 2000 of 1,506 pounds per capita.

### **Who was left out of the economic success?**

The Oregon Economic and Community Development Department maintains a list of "distressed areas." The evaluation of distressed communities is based on data about county unemployment rates, per capita income, average pay per worker, population changes, unemployment insurance benefit recipients, the industrial diversity based on employment distribution, families in poverty, and job loss. Based on data from these sources, the department calculates an index for which the threshold is 1.2. For Multnomah County the Lents neighborhood and North/Northeast Portland are on this list of distressed communities with an index of 1.27 and 1.48 respectively. Banks (1.85) and Gaston (1.86) in Washington County are distressed communities as well.

Working through the state needs and issues process many of the communities of rural western Washington County have identified priorities in services and infrastructure to address the quality of life issues outlined above. A similar process is underway in the Lents neighborhood and North/Northeast Portland through the Portland Development Commission's Urban Renewal Process.

While the state list of "distressed areas" is instructive, our understanding of distress should be expanded to include communities that feature significant concentrations of the individual characteristics described in the state index, as well as unincorporated areas that are not examined and communities of interest bypassed by our economic growth. As the U.S. Census releases detailed information in the next year this could be a priority for further study.



## □ Clusters

*The Portland economy has grown consistently for a decade and a half, almost always outperforming the nation. Population, wages, and personal incomes have risen while the economy as a whole experienced a fundamental transformation from a singular reliance on natural resource industries to an increasingly diversified, knowledge-based economy. Today we no longer rely solely on drawing a living from the land, but trade on the products and services created by skilled people attracted to our community and its natural and built environments. These skilled people, attached to this special place, have allowed us to develop distinctive competencies that manifest themselves in industry clusters that are the driving force behind the regional economy.*

### What drives the economy?

The regional economic structure consists of core industry competencies that determine future economic prosperity and success. The competencies are apparent in sector growth patterns showing that several industries grew much faster in Portland than they did in the rest of the country. These key export-based industries are high technology, nursery products, creative services, and the metals industry. These four industries form the region's primary industrial clusters, which are rooted in the region and draw on current local strengths that should be sustained by the Regional Investment Plan.

These clusters drive the economy because their products are exported and their economic activity contributes to multiplier effects that benefit the region as a whole. A healthy growth of such industry clusters will contribute to their comparative and competitive economic advantage. Industry cluster growth will have obvious effects such as direct employment impacts of new hiring or economic multiplier effects. These multipliers are felt through the local economy through related growth in the retail and personal services sectors.

There are, however, less obvious effects. Firms belonging to healthy growing clusters connect with firms from other sectors in supplier-buyer relationships. These relationships contribute to the exchange of information between the firms which will help the companies to be more innovative and therefore more competitive in a global economy. Thus, industry clusters also contribute in an intangible way by cultivating these relationships, creating a form of "social capital" within the local economy.

Table 1: Portland's cluster performance, 1990 to 1996

Cluster	Number of Jobs 1990	Number of Jobs 1996	% Change
High technology	37,711	45,582	20.9%
Nursery Products	6,261	8,926	42.6%
Creative Services	8,212*	13,523*	65.7%
Metals, machinery and transportation equipment	35,817	37,134	3.7%
Lumber and Wood Products	22,041	17,610	-20.1%

Source: *Progress of a Region: The Metropolitan Economy in the 1990s. Technical Report of the Regional Connections Project, Institute of Portland Metropolitan Studies, College of Urban and Public Affairs, Portland State University, April 1999.*

\* Data for creative services employment is for 1992 and 1997 respectively.



Portland's industry clusters are not static. They are dynamic and experience different rates of change over time. This pattern has been evident especially in the lumber and wood products cluster. Employment in this industry has declined dramatically, dropping 20 percent, or more than 4,000 jobs between 1990 and 1996. At the same time, other clusters experienced employment growth ranging from more than 7,000 jobs in high technology to almost 2,000 jobs in metals and transportation equipment.

### High Technology Cluster

High technology industries in Portland's Silicon Forest have been characterized during the 1990s by rapid job growth and high and rising wages. Further, massive industry investment has promoted a rapidly increasing level of research and development activity, and fostered the development of many fast growing, indigenous firms. Portland's high technology industry cluster exhibits a distinctive specialization in numerous areas. These include semiconductor manufacturing, semiconductor materials, and semiconductor manufacturing equipment, as well as electronic design automation software and display technologies.

*Table 2: Economic Dimensions of Portland's high technology cluster*

Segment	Employment	Average Pay
Computers	4,206	\$ 48,755
Electronic & Electrical Machinery	23,530	\$ 57,771
Instruments	10,378	\$ 53,535
High Tech Wholesaling	11,607	\$ 49,195
Software and Computer Services	11,856	\$ 51,781
Total, Oregon Portion of Metro Area	61,577	\$ 53,671

*Source: Oregon Employment Department, 1997 Covered Employment and Payroll Data.*

Major high technology firms in the area include: Intel (14,500 employees), Tektronix (4,000), Sequent Computer Systems, now IBM (2,500), Hewlett-Packard Co. (2,000), Epson Portland Inc. (1,800), SEH America Inc. (1,800), Wacker Siltronic (1,700), Merix (1,100), Precision Interconnect (1,000) and Planar Systems (900). The knowledge created in the region by these top ten high technology firms is evidenced by the 1,459 patents they generated in 1998. In fact, between 1990 and 1998 patent growth in the region increased 10 percent per year compared to 6 percent in the rest of the nation.

Firms that take root in the Silicon Forest experience advantages from this critical mass of high technology firms. They are sustained by a growing number of venture capital firms and specialized business services, as well as a skilled labor pool from which the companies can draw. The regional high technology cluster is also supported by two important business associations: the Oregon chapter of the American Electronics Association (AEA) and the Software Association of Oregon (SAO). Geographically, high technology businesses are mainly concentrated in Washington County and some of the foreign-owned firms, mainly silicon wafer producers and large-scale fabs, are located in Clark and Multnomah counties.

## Nursery Products Cluster

The nursery products industry represents another important cluster, one with a history in the regional economy dating back to the turn of the century. The industry consists of more than 1,000 mostly small, locally owned firms, employing more than 10,000 workers, and generating annual sales of more than half a billion dollars.

*Table 3: Economic Dimensions of Portland's nursery industry cluster, Metro Portland & Marion County, 1998*

Segment	Employment	Average Pay
Nursery products	6,408	\$ 19,600
Landscape and horticultural consulting services	359	\$ 26,957
Lawn and garden services	3,226	\$ 22,551
Shrub and tree services	306	\$ 26,801
Wholesale flowers and florist supplies	791	\$ 19,939
Retail nursery and garden supply stores	740	\$ 21,484
Totals	11,829	\$ 20,956

Source: Oregon Employment Department, 1998 Covered Employment and Payroll Data.

A key to the industry's success has been cooperative marketing efforts promoted by the Oregon Association of Nurserymen (the state trade association) as well as the tight geographic concentration of firms on the fringes of the urbanized portion of the metro region. Producing a highly specialized, high quality, "value-added" agricultural product, Oregon's nursery industry accounts for about 11 percent of all the nursery products produced in the United States.

## Creative Services Cluster

The creative services industry cluster is largely concentrated in downtown Portland. This industry encompasses firms in software, multimedia, advertising, public relations, film and video, and design firms. Between 1992 and 1997, jobs in creative services grew twice as fast as the regional economy, 9 percent annually for creative services, compared to the 4.4 percent for the metropolitan average.

*Table 4: Economic Dimensions of Portland's creative service cluster, 1997*

Segment	Employment	Average Pay
Advertising agencies and services	2,346	\$ 43,694
Advertising, commercial photo, graphic design	1,224	\$ 31,201
Computer software, integration and data processing	7,719	\$ 52,106
Motion pictures	1,257	\$ 31,655
Theatrical producers and services	587	\$ 18,201
Public relations services	390	\$ 45,554
Totals	13,523	\$ 45,193

Source: Oregon Employment Department, 1997 Covered Employment and Payroll Data.

The economic vitality of this industry is enhanced by firms' strong relationships to each other as suppliers and customers of each other's services and products. The industry's Creative Services Alliance is the focus of a wide range of collaborative industry activities. In addition to enhancement of collaboration and networking among firms, the Alliance supports businesses in areas of work including talent and workforce development, marketing the region as a creative service hub, and promoting business development infrastructure.

## Metals Products Cluster

Within the Portland region's manufacturing sector the cluster of firms in the metals industry is an important employer. About 1,700 firms directly employ more than 55,000 workers. The average pay for the industry is \$35,000 per year, about one-third more than the average for all workers in the Oregon economy. Metals industry firms are involved in a diverse range of activities. These include primary metal production, and manufacturing of fabricated components, as well as designing and building a wide range of specialized machinery and transportation products such as trucks, railcars, ships, and aircraft components.

*Table 5: Economic Dimensions of Portland's metals products cluster, 1996*

Segment	Employment	Average Pay
Primary metals industries	11,028	\$ 40,411
Fabricated metals products	13,810	\$ 30,794
Industrial machinery & equipment	14,972	\$ 39,237
Transportation equipment	15,508	\$ 35,767
Total	55,318	\$ 35,397

Source: Oregon Employment Department, 1996 Covered Employment and Payroll Data.

Geographically, metals products manufacturers are fairly dispersed throughout the region, with a few concentrations in widely scattered locations. The Metals Industry Council primarily represents the larger firms in the industry, while The Oregon Precision Metal Fabricators Association works with smaller firms, many of whom are suppliers to the high tech industry.

## What do clusters mean for the region's economic performance?

The growth of specialized industry clusters has occurred as the region moves from a singular reliance on the natural landscape to a diversified economy built on a landscape of knowledge and skills. Understanding the connection between the health of clusters and the region's healthy economic performance has a great significance for the Regional Investment Plan. As outlined below, the region has thrived economically during this transition.

*Table 6: Key Economic Indicators, Portland Metropolitan Area, 1997 compared to all U.S. Metro Areas*

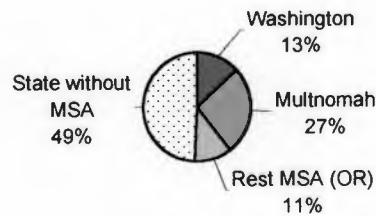
	Portland	All U.S. Metropolitan Areas
Population	1,789,790	
Population Growth 1990-1997	2.3%	1.1%
Employment	1,165,642	
Employment Growth 1990-1997	3.4%	1.6%
Manufacturing Employment	155,263	
Manufacturing Growth 1990-1997	2.5%	-0.4%
Per Capita Income	\$ 27,388	\$ 26,840
(Percent of Metro Average)	102.0%	100%
Per Capita Income Growth 1990-1997	4.8%	4.0%

Source: Bureau of Economic Analysis, Regional Economic Information System



For nearly a decade and a half, Portland has compiled a record of strong employment and population growth. The population of the Portland metropolitan region has steadily increased over the past three decades totaling 1,789,790 in 1997. The majority of this increase came from in-migration into the region. According to 1997 population estimates, the majority of the region's population lives in the region's job centers of Multnomah and Washington counties.

Chart 7: Metro Share of State Employment, 1998



Source: Regional Economic Information System, BEA

The region has recorded increases in employment since 1983. Total full- and part-time employment in the Portland area economy has grown especially rapidly during the 1990s. Since 1990, total full- and part-time employment in the region has increased from 923,000 workers to nearly 1,185,000 workers in 1998. During the eight-year period from 1990 to 1998, the Portland metro economy added nearly 262,000 jobs. In 1998, Washington and Multnomah counties accounted for 40 percent of Oregon's employment.

The region added 26,000 new manufacturing jobs between 1990 and 1998. This growth in Portland, driven by expansions in high skill and high technology manufacturing, has occurred at a time when manufacturing employment has been declining nationally.

Portland's unemployment rate has consistently been below that of both the nation and the rest of Oregon as well. The region's 1997 unemployment rate of 4.3 percent is in keeping with rates that have been low by historical standards over the past decade. Unemployment ranged between 3.7 percent, the low point in calendar year 1995, and 6.4 percent for 1992, the highest rate recorded in the 1990s.



## **5. Needs & Barriers**

*While our economy is doing well, our single greatest barrier to continued success has been the lack of a coordinated economic and community development strategy. This undermines efforts to sustain our economic growth and broaden its reach throughout the communities that make up the region. Sincere efforts at the local level may understand the fundamental connections between people, places, and industrial clusters in driving the regional economy, but they lack a framework to connect these themes across political and programmatic boundaries. Beyond this broad concern, several needs and barriers related to the plan's strategic elements emerged during the data collection process:*

### **□ People**

---

While workforce development is consistently cited as a priority across the region, the effectiveness of programs, whether in higher education, secondary schools, or employment and training, was questioned in interviews conducted for this plan.

Despite the fact that the region is job-rich, and while incomes are rising, it appears that the region does not develop enough family-wage jobs. In many areas we face a skills mismatch between the current population and the new, high-wage jobs that are driving the regional economy. This leads to inequitable distribution of economic growth and a failure to affect persistent pockets of poverty in the region. While as a region we may agree in response that our people need to develop greater expertise, the scope of the problem overwhelms purely local action.

Structural barriers to access to education and training for some population groups may also pose challenges to regional economic and community development policy. Needs in specific minority communities for mentoring and/or programs to link residents to regional workforce development and education opportunities are one of many responses to such structural barriers.

### **□ Places**

---

Further, our public infrastructure, particularly in transportation, represents a frequently cited concern for communities across the region. Our regional growth is creating challenges in areas of access and affordability that reach across political boundaries and affect how we work, live and do business. These problems raise fundamental concerns about our quality of life and the very reasons that have attracted and retain the talented people who work in the industrial clusters that drive our economy.

In addition, distressed neighborhoods and communities face numerous service and infrastructure needs in order to be able to provide jobs and livable residential environments. While distressed areas may enjoy some of the strongest sense of community in the region, they face some of the greatest barriers to maintaining quality of life.

□ **Clusters**

---

Unforeseen developments in the world economy might pose new needs and barriers to the development of various export industries in the region. Thus, ongoing monitoring of the health of the region's clusters and attention to tasks that facilitate their development remain an important need for the region.

## **6. The Regional Investment Strategic Framework**

Based on its analysis of the region's resources, needs, and barriers, the Regional Investment Board has identified three goals for its investments in the region:

- ❑ **People:** Increase the capacity of all people to participate in and benefit from economic growth by improving **worker skills**, providing pathways to **entrepreneurship**, and enhancing **life-long learning opportunities**.
- ❑ **Places:** Ensure that all **communities** are great places to live and do business, have adequate and high quality **public infrastructure**, and sustain **environmental quality**. In considering these issues, the Board will pay special attention to the **needs of distressed communities**.
- ❑ **Clusters:** Foster vital, innovative **industry clusters** by meeting the physical needs of industry, promoting cluster relationships, and supporting efforts to improve global competitiveness and enhance innovative capacity. Regional clusters currently include high tech, creative services, metals/machinery/transportation equipment, nursery products, special foods/craft beverages, and lumber and wood products.

<b>Strategic Elements</b>	<b>Primary Strategy</b>	<b>Secondary Strategies</b>
<b>People</b>	<b>Improve worker skills.</b>	Enhance opportunities for and pathways to entrepreneurship.
		Educate the next workforce: Higher education
		Educate the next workforce: Primary and secondary education
<b>Places</b>	<b>Enhance the livability of and business climate within distressed communities.</b>	Maintain and improve quality of life
		Provide quality public infrastructure
		Sustain and enhance environmental quality
<b>Clusters</b>	<b>Foster vital, innovative industry clusters for:</b> <ul style="list-style-type: none"> <li>- high technology,</li> <li>- creative services,</li> <li>- metals, machinery, transportation equipment,</li> <li>- nursery products,</li> <li>- specialty foods / craft beverages; and</li> <li>- lumber and wood products.</li> </ul>	Meet the physical needs of industry
		Promote cluster relationships
		Improve global competitiveness
		Enhance innovation



## People

*“...increase the capacity of all people to participate and benefit from our economic growth...”*

### Primary Strategy:

#### ✓ Improve worker skills

The region’s continued strengths in traditional and emerging industries are challenged by the increasingly technical demands of work in these fields, and the inability of many firms in some industries to attract younger workers to replace their rapidly aging workforces.

- ⇒ **The Regional Investment Plan should assist both workers and employers with maintaining up-to-date and transferable skills, now and into the future.**

### Secondary Strategies:

#### ✓ Enhance opportunities for and pathways to entrepreneurship

Despite more than a decade of dramatic increases in employment, the regional economy has not produced enough family-wage jobs, and faces persistent problems with poverty, suggesting that the benefits of economic growth have not been enjoyed evenly across the region’s increasingly diverse population.

- ⇒ **The Regional Investment Plan should assist those that have not had the opportunity to participate in the strong economy, particularly residents of rural and distressed communities, by promoting entrepreneurship opportunities, as well as efforts that support those facing barriers to participation in the workforce.**

#### ✓ Educate the next workforce: Higher education

Having relied heavily on attracting skilled workers from outside of Oregon, the region’s industries need a higher education system that enables the region to “grow its own” expertise in the workforce. Additionally the system should be able to provide the continuing education demanded by our existing high skills workforce.

- ⇒ **The Regional Investment Plan should support enhanced offerings from universities and community colleges across the region that augment public and private cluster workforce development efforts.**

#### ✓ Educate the next workforce: Primary and secondary education

A quality primary and secondary system is crucial both to developing a skilled workforce and providing everyone with the opportunity to benefit from the strong economy. Further, negative student outcomes could create barriers to retaining talented people and the firms they work for in the region.

- ⇒ **The Regional Investment Plan should support efforts aimed at improving outcomes in primary and secondary education, while also forging closer links between education and industry.**

## Places

*“...catalyzing efforts to ensure that all communities are great places to live and do business...”*

### Primary Strategy:

#### ✓ Enhance the livability of and business climate within distressed communities

Certain communities consistently bear the burden of the region’s problems with poverty and limited opportunities for family-wage employment. Representing untapped resources for firms, their development would improve the region’s competitive position.

- ⇒ **The Regional Investment Plan should work to bring the benefits of our region’s economic growth to distressed or lagging communities.**

### Secondary Strategies

#### ✓ Maintain and improve quality of life

Concern over maintaining and improving quality of life is a defining characteristic for residents in both Multnomah and Washington Counties. Our quality of life is found in the spectacular natural environment, vital and attractive city centers, vital and safe communities, and healthy urban/rural/suburban systems that meet the needs of our region’s people.

- ⇒ **The Regional Investment Plan should support efforts aimed at addressing the effects of community growth and change that threaten to undermine the region’s quality of life.**

#### ✓ Provide quality public infrastructure

Infrastructure is vital both to our quality of life and economic competitiveness as a region. The quality of that infrastructure has been challenged by our growth and success in recent years.

- ⇒ **The Regional Investment Plan should support efforts to upgrade and update infrastructure in a manner that is efficient and sustainable.**

#### ✓ Sustain and enhance environmental quality

Maintaining our quality of life over the long term is intimately connected with the quality of the natural and built environment.

- ⇒ **The Regional Investment Plan should promote a long term regional outlook that maintains a commitment to environmental quality as the region’s “brand.”**

## Clusters

*“...fostering vital, innovative industry clusters.”*

### Primary Strategy

#### ✓ Foster vital, innovative industry clusters for:

- high technology
- creative services
- metals, machinery, transportation equipment
- nursery products
- specialty foods/craft beverages, and
- lumber and wood products.

### Secondary Strategies

#### ✓ Meet the physical needs of industry

Industry clusters are firmly rooted in geography. While the region hosts several unique physical environments where industry clusters have thrived, some industries and some areas face challenges for economic growth. These challenges include the availability of land or buildings, and the ability to efficiently move goods and people.

- ⇒ **The Regional Investment Plan should support efforts to retain healthy industry clusters in communities across the region.**

#### ✓ Promote cluster relations

Individual firms that make up Washington and Multnomah County’s industry clusters are rooted in relationships to each other and to public and private institutions in the region. Such relationships are important for the competitive success of the clusters.

- ⇒ **The Regional Investment Plan should promote cluster relationships as well as a better understanding of the dynamics of such clusters.**

#### ✓ Improve global competitiveness

The region’s industry clusters compete in global markets. Connections to producers, suppliers and markets regionally, nationally, as well as internationally are critical to maintaining competition.

- ⇒ **The Regional Investment Plan should support projects that ensure the global competitiveness of the businesses in the region.**

#### ✓ Enhance innovation

Washington and Multnomah County host unique industrial clusters. The success and resilience of these clusters depends on the ability of the businesses to create innovation in products and processes.

- ⇒ **The Regional Investment Plan should support efforts to enhance the innovative capacity of the region’s industrial clusters.**



## **7. Implementation**

After the Board approved the Regional Investment Strategy, a request for proposals was sent out on November 21, 2000 to more than 400 interested parties in Multnomah and Washington County. Applicants were given until February 9, 2001 to submit proposals. Workshops for applicants to learn more about the Regional Investment Program took place during January in Gresham, Hillsboro, and Northeast Portland. These meetings provided applicants with the opportunity to meet the Board staff and learn important information concerning the Regional Investment Plan, the application, contracting and other issues. Staff will review submitted proposals and the Board will select projects using the following criteria:

- ❑ **Responsiveness to application requirements** outlined in the RFP. Requirements include:
  1. Executive summary: a clear and concise presentation of the project goals and outcomes.
  2. Project narrative: the narrative should provide a clear explanation of how the proposed project responds to the goals and strategy presented in the Regional Investment Plan. In addition, the narrative should explain how the project will be accomplished, what its outputs and outcomes will be, and how the project will be assessed.
  3. Budget: a presentation of how all resources needed to complete the project will be secured and allocated.
  4. Letters of commitment from other funding sources.
  5. Letters of support from project partners.
- ❑ **Addressing the strategic themes:** The Regional Investment Board has developed the strategic themes of people, places, and clusters in response to conditions in the region and near-term opportunities. It expects proposed projects will directly address at least one of these three themes consistent with the objectives outlined in the Regional Investment Plan. The Board also recognizes that the three strategic areas are closely linked to each other. To reflect these interdependencies, project proposals that pertain to more than one of the key themes will be encouraged and reviewed more favorably.
- ❑ **Leveraging funds:** Projects must leverage funding or in-kind contributions from other sources or demonstrate why it is not feasible or warranted at this time. Given the diverse and dynamic nature of the region, and the wide range of needs in area communities, the Board does not expect to provide 100 percent of the resources needed to successfully complete proposed projects. Further, if projects propose using Regional or Rural Investment funds as match for other, as yet unsecured funds necessary for the completion of the project, applicants should explain what the Regional or Rural Investment funds will produce in the way of outputs and outcomes during the project period.
- ❑ **Partnerships:** Projects must show partnerships with other organizations, institutions or groups or demonstrate why it is not feasible or warranted at this time. If an organization, institution, or agency is involved in any of the activities of a proposed project, or expected to respond in any way to either a project or its products, then a letter of support should be provided by that organization, institution, or agency.

In making its selections, the Board will fund projects in a manner that is geographically balanced. Although final intermediate outcomes for each project will be negotiated at the time when contracts are signed, the Board will also pay close attention to the proposed impact of projects and the manner in which applicants propose to assess impacts. The Board may choose to negotiate funding levels and other aspects of projects with proposers.

Further, the Board recognizes that some projects will require more than one year to be of greatest utility to the region, and to fully respond to the goals of the Plan. The issues addressed by this Plan are not easily addressed or resolved solely with the resources of the Board or within a single year. Consequently, the Board encourages sponsors of long-term projects to submit proposals recognizing that funding must be requested in increments and outcomes need to be assessed and demonstrated annually.

Given the broad nature of its task, and the fact that this is the first round of investments in the region, the Board will necessarily be exercising its discretion in crafting a package of investments that in its view will best meet the needs of the region and best, as a package, enable the Board to learn how its Regional Investment Strategy works. The Board will screen and rank projects for funding, keeping in mind the criteria listed above and its interest in crafting the best overall package of projects. The Board will select projects for funding in February and March. All decisions of the Board will be final. Successful applicants will enter into contracts with the Portland Development Commission, the Board's fiscal agent, and begin work in April/May. Funds must be expended within one year.

### **Contracting Requirements**

The Portland Development Commission, acting as the contract administrator for the Multnomah-Washington Regional Investment Board, requires the following information and documentation be provided in order to execute Grant Award Agreements with successful applicants:

#### **Certificates of Insurance:**

- ☐ Provide commercial general and automobile liability insurance written on an "occurrence" basis.
- ☐ Such insurance shall be in the amount of not less than \$500,000 combined single limit for liability insuring bodily and/or personal injury, including death and disease, and property damages.
- ☐ Include coverage for any owned, non-owned or hired motor vehicle equipment, contracted liability, operations, products, completed operations, negligent acts, and all operations of subcontractors.
- ☐ Provide a certificate of insurance that names the "*Portland Development Commission and the City of Portland and each of their respective officials, employees and agents*" as additional insureds (exact language must be used).
- ☐ Provide that coverage afforded will not be canceled without at least 30 days prior written notice to the Commission.

**Worker's Compensation Insurance:**

- The contractor, its subcontractors, if any, and all employers working under this contract who are subject employers under the Oregon Workers' Compensation Law shall comply with ORS 656.017, which requires them to provide workers' compensation coverage for all their subject workers. The contractor shall maintain workers' compensation insurance coverage for the duration of the contract.

**Federal Tax ID Number:**

- Every contractor is required to provide their federal tax ID number.

**State Tax ID Number:**

- Every contractor is required to provide their state tax ID number.

**Business License (For Profit Companies or Organizations):**

- Every for profit contractor is required to hold a City of Portland Business License or the appropriate Business License for the location of the organization and its work. These organizations will also need to enter into a "First Source Hiring Agreement" with the Board, which will commit the contractor to attempting to employ residents of distressed communities through *worksystems inc.*, the regional workforce agency.

**Reporting Requirements**

As a part of this program, the State of Oregon requires that contractors must also report on a regular schedule detailed information on their activities. These involve not only spending by contractors and their partners, but information on project outputs and outcomes as well. Failure to completely respond to reporting requirements can be a reason for contract termination.

**8. Rural Action Plan**

Rural investment funds will be made available to areas in the region outside of the Metro Urban Growth Boundary, including incorporated cities located in those rural areas. The Regional Investment Board will apply the same set of criteria for projects applying for rural, regional, and multi-regional investment funds. All applicants should respond to the strategic framework outlined in the Regional Investment Plan.

**9. Disadvantaged / Minority Involvement**

The Regional Investment Plan recognizes that the population of Multnomah and Washington County is becoming more diverse. Additionally, the two counties still face pockets of poverty highlighting the fact that there are communities that have not shared in the benefits of a growing regional economy. Therefore, the Regional Investment Plan identifies specifically the needs of distressed communities as a primary investment target.



The Regional Investment Board and staff solicited comprehensive input from a variety of community and economic development groups. Input was solicited from various ethnic groups, rural communities, as well as representatives from low-income communities. Additionally, the Board and staff has made extensive outreach efforts to disadvantaged and minority individuals, groups, and organizations regarding the existence of the Regional Investment Program, the availability of funds, and the application process. We have also consciously located workshops for applicants in diverse communities.

## **10. Evaluation**

The evaluation of the Regional Investment Program is based on the goals established for the region. The Board identified specific higher level outcomes as regional benchmarks (see matrix next page) that will be collected and used to evaluate the overall strategy. In addition, the Board will work with project applicants to define, measure, and monitor outputs and intermediate outcomes as described below.

### **Outputs**

- The numbers of items produced by a program or project funded by the Regional Investment Board. Viewed through a short term perspective they indicate progress toward intermediate outcomes.

### **Intermediate Outcomes**

- Proposed by applicants, these milestones are viewed through a short to medium term perspective. They represent the changes associated with the successful completion of a program or project and which contribute to overall efforts aimed at achieving high level outcomes.

### **High Level Outcomes**

- Changes in the overall quality of the region's economy or capacity of its workforce being sought through the combined efforts of public, private, and nonprofit sector efforts. Progress towards these broad goals is viewed over a long-term perspective and is affected by societal forces. Achieving these outcomes is beyond the scope of an individual project.

If applicable contractors must also report of the relationship of their activities to distressed areas, as well as any jobs that may have been created or retained in the region that can credited to their activities.

Strategic Elements	Regional Investment Goals	Intermediate Outcomes	High Level Outcome / Regional Benchmark
<b>People</b>	<i>Increase the capacity of all people to participate in and benefit from economic growth by improving <b>worker skills</b>, providing pathways to <b>entrepreneurship</b>, and enhancing <b>life-long learning opportunities</b>.</i>	<i>To be proposed by project applicants</i>	<ol style="list-style-type: none"> <li>1. Percentage increase of adults completing high school or equivalent</li> <li>2. Percentage increase in adults who have postsecondary professional-technical credentials</li> <li>3. Percentage increase in adults who have completed – bachelor's degree – advanced degree</li> <li>4. Percentage increase in average wages compared to percentage increase in regional median income</li> <li>5. Percentage increase in number of certified minority and women-owned business enterprises</li> <li>6. Number of additional business start-ups</li> </ol>
<b>Places</b>	<i>Ensure that all <b>communities</b> are great places to live and do business, have adequate and high quality <b>public infrastructure</b>, and sustain <b>environmental quality</b>. In considering these issues, the Board will pay special attention to the <b>needs of distressed communities</b>.</i>	<i>To be proposed by project applicants</i>	<ol style="list-style-type: none"> <li>1. Percentage change in median family income in distressed communities as compared to the percent change of regional median income</li> <li>2. Percent change in unemployment rate in distressed communities as compared to the percent change of regional unemployment rate</li> <li>3. Percent change in poverty rate in distressed communities as compared to the percent change of regional poverty rate</li> <li>4. Percentage decrease of households paying more than 30% of gross monthly income for housing</li> <li>5. Percentage increase in homeownership</li> <li>6. Percentage increase in households able to afford the median-priced house</li> <li>7. Decrease in number of air quality non-attainment days</li> <li>8. Decrease in number of water quality limited streams or stream segments</li> <li>9. Percentage increase in residents who commute fewer than 30 minutes between home and work</li> <li>10. Decrease of vehicle miles traveled per capita per year</li> <li>11. Percentage increase of roads in fair or better condition</li> </ol>
<b>Clusters</b>	<i>Foster vital, innovative <b>industry clusters</b> by meeting the physical needs of industry, promoting cluster relationships, and supporting efforts to improve global competitiveness and enhance innovative capacity. Regional clusters currently include high tech, creative services, metals/machinery/transportation equipment, nursery products, special foods/craft beverages, and lumber and wood products.</i>	<i>To be proposed by project applicants</i>	<ol style="list-style-type: none"> <li>1. Increase in value-added exports as a percent of total exports</li> <li>2. Percentage increase in registered patents</li> <li>3. Percentage increase of industrial property that meets development requirements</li> <li>4. Enrollment increase in graduate and continuing education programs</li> </ol>

## **11. Management**

Washington and Multnomah County have each appointed six members to the Regional Investment Board. The Multnomah and Washington County Region has contracted with the Portland Development Commission as the fiscal agent and with Portland State University's Institute of Portland Metropolitan Studies for administrative management of the plan. In this capacity, Portland Development Commission and Portland State University will record and document the expenditures of the funds allocated by the Regional Investment Board, and track the progress of projects.

## **12. First-Source Hiring Agreements for "Benefited Businesses"**

In the event that funding is directly awarded to private businesses, a first-source hiring agreement for "benefited businesses" (ORS 461.740) will be required.



### **13. Appendices**

#### **A) Glossary of Terms**

*Capacity* - The ability and resources needed to take action, improve conditions or circumstances, and/or engage the economy.

*Competitiveness* - The qualities associated with being able to attract and retain enterprises, investors, and labor needed to sustain the economy.

*Distressed Communities* - Communities defined by the Oregon Economic and Community Development Department as lagging economically compared to other Oregon communities.

*High Level Outcomes* - Changes in the overall quality of the region's economy or capacity of its workforce being sought through the combined efforts of public, private, and nonprofit sector efforts. Progress towards these broad goals is viewed over a long-term perspective and is affected by societal forces. Achieving these outcomes is beyond the scope of an individual project.

*Industry Clusters* - Groups of firms that work together to promote innovation and competitiveness with respect to global markets and standards.

*Inputs* - The resources committed to a program or project.

*Intermediate Outcomes* - These milestones are viewed through a short to medium term perspective. They represent the changes associated with the successful completion of a program or project and which contribute to overall efforts aimed at achieving high level outcomes.

*Leverage* - Promote the contribution of resources to programs or projects.

*Match* - dollars or other in-kind resources committed to a project which augment dollars being requested from the Regional Investment Board.

*Multiregional Projects* - Projects that are jointly funded by the Multnomah-Washington County Regional Investment Board and at least one other Regional Investment Board in the state of Oregon.

*Outputs* - The numbers of items produced by a program or project funded by the Regional Investment Board. Viewed through a short term perspective they indicate progress toward intermediate outcomes.

*Partners* - Individuals, organizations, or firms committed to jointly funding and conducting a program or project.

*Primary Strategy* - The highest priorities of the Regional Investment Board.

*Public Infrastructure* - Any public works, telecommunications, or other infrastructure owned and developed by a city, county, the state, regional government, special or port district.

*Regional Benchmarks* - The high level outcomes being sought by public bodies in the metropolitan area.

*Regional Economy* - The economy of the six-county Portland Metropolitan Statistical Area.

*Regional Investment Board* - The Board appointed, in this case, by Multnomah and Washington counties and charged with developing and implementing the Regional Investment Plan.

*Regional Investment Goals* - The goals to be served by the Regional Investment Plan. Progress towards these goals is assessed through the use of High Level Outcomes and Regional Benchmarks.

*Regional Investment Plan* - The strategy used by the Regional Investment Board to guide its investment of regional, multiregional, and rural investment funds in the region.

*Regional Investment Program* - The program developed by the State of Oregon to support regional efforts to sustain and improve regional economies and promote needed community development efforts.

*Rural Action Plan* - A strategy for addressing the needs of communities and enterprises located outside of urban growth boundaries.

*Secondary Strategy* - Actions needed to support Primary Strategies and/or achieve the Regional Investment Goals.

*Strategic Element* - The central summary themes for the Primary Strategies.

**B) Interviews**

<b>Organization</b>	<b>Contact</b>	<b>Date of Interview</b>
Oregon Economic and Community Development Department	Joan Rutledge Marcy Jacobs	July 7, 2000
Consultant	Pat Scruggs	July 12, 2000
Portland Development Commission	Larry Pederson	July 13, 2000
City of Hillsboro	David Lawrence	July 13, 2000
City of Beaverton	Janet Young	July 13, 2000
Neighborhood Partnership Fund	Cathey Briggs Kathy Kniep	July 14, 2000
City of Gresham	Shelly Parini Max Talbot	July 17, 2000
Westside Economic Alliance	Betty Atteberry	July 18, 2000
Consultant	Jan Burreson	July 18, 2000
Professor	Karen Gibson	July 18, 2000
Washington County	Dennis Mulvihill	July 19, 2000
Columbia River Economic Development Council	Bart Philips	July 19, 2000
Columbia Pacific Economic Development District	Jeff King	July 19, 2000
Hillsboro Chamber of Commerce	Shirley Huffman	July 19, 2000
City of Tualatin	Doug Rux	July 20, 2000
City of Vancouver	Gerald Baugh	July 20, 2000
Worksystems inc.	Kristin Wolff	July 20, 2000
Oregon Association of Nurserymen	Jeff McIvor	July 20, 2000
Multnomah County	John Rackowitz	July 21, 2000
Oregon Economic and Community Development Department	Ellen Nyberg	July 24, 2000
Community Development Network	Tasha Harmond	July 25, 2000
The Skanner	Bernie Foster	August 30, 2000
Oregon Business Council	Duncan Wise	September 14, 2000
Worksystems inc.	John Ball	September 18, 2000
OAME	Sam Brooks	September 18, 2000
Hispanic Chamber of Commerce	Gail Castillo	September 19, 2000
Clackamas County	Greg Jenks	September 28, 2000
US EDA	Ann Berblinger	September 29, 2000



Portland Development Commission	Lita Colligan	October 2, 2000
City of Portland Commissioner	Eric Sten	October 4, 2000
Mayor's Office	Linly Rees	October 6, 2000
Japan America Society	Jan Bureson	November, 2000
OECD, Clackamas	Pat Allen	November, 2000
Rural Development Initiative	Craig Smith	November, 2000
Sapporo Chamber	Yoshio Kurosaki	November, 2000
African American Chamber of Commerce	Roy Jay	November 10, 2000
Oregon Agri-Business Council	Mary Stewart	November 13, 2000
Multnomah County	Jeff Cogen	November 15, 2000
Portland-Shouzhou Economic Development Commission	Jin Lan	November 21, 2000
Portland Metro Chamber	Sho Dozono	December 13, 2000

### C) Bibliography

Beaverton Department of Economic Development (2000). Draft Economic Strategic Plan. A Framework for Creating Business and Jobs. Beaverton, Oregon: City of Beaverton.

City of Forest Grove (2000) Economic Development Action Plan. Forest Grove, Oregon.

City of Tualatin (1984). Economic Development Action Plan.

City of Tualatin (1989). Update to Tualatin Economic Development Action Plan.

Columbia-Pacific Economic Development District (2000) 2000-2001 Comprehensive Economic Plan Annual Update. St. Helen's Oregon.

Columbia-Pacific Economic Development District (2000) Western Washington 2001 Needs and Issues List.

Gresham Department of Economic and Community Development (2000). Draft Vision Statement: Mayor's Economic Development Forum. Gresham, Oregon: City of Gresham.

Gresham City Hall (2000). Gresham and East Multnomah County Economic Development Action Plan. Gresham, Oregon: City of Gresham.

Hillsboro Vision Task Force (2000). Hillsboro 2020 Vision: Draft Final Report. Hillsboro, Oregon: City of Hillsboro.

Hood River Economic Development Alliance (2000). Regional Economic and Community Development Plan. Clackamas, Oregon: Hood River Economic Development District.

Housing and Community Development Commission (2000). Consolidated Plan 2000: Action Plans 2000-2001. Portland: City of Portland, City of Gresham, Multnomah County.

Housing and Community Development Commission (2000). Consolidated Plan 2000. Portland: City of Portland, City of Gresham, Multnomah County.

Institute of Portland Metropolitan Studies (2000). Stories of Change: Industry Clusters in the Metropolitan Portland Economy. Portland, Oregon: Portland State University.

Institute of Portland Metropolitan Studies (1999). Progress of a Region: The Metropolitan Portland Economy in the 1990s. Technical Report of the Regional Connections Project. Portland, Oregon: Portland State University.

Institute of Portland Metropolitan Studies (1999). Metropolitan Briefing Book. Portland: Portland State University.

Institute of Portland Metropolitan Studies (1995). A Pathway to Sustainability, Portland: Portland State University.

Institute of Portland Metropolitan Studies and Portland State University Capstone Program (2000). Empowering the Community through Technology: An Assessment. Portland: Portland State University.

Metro Affordable Housing Technical Advisory Council (2000). Regional Affordable Housing Strategy. Portland: Metro.

Multnomah County (1999). Multnomah County Strategic Investment Program. Portland.

Northwest Oregon Regional Partnership (2000). Northwest Oregon Regional Plan. St. Helen's, Oregon: Columbia Pacific Economic Development District.

Northwest Policy Center (2000). Northwest Job Gap Study. Portland: Oregon Action.

Neighborhood Partnership Fund (1999). Regional "Placeholder" for Portland-Vancouver Area Consolidated and PHA Plans (Draft revised 2/8/00).

Oregon Business Council (2000). The Oregon Agenda. Preparing for the 2001 Legislative Session. Portland, Oregon: Oregon Business Council.

Oregon Center for Public Policy (2000). Prosperity in Perspective: The State of Working Oregon 2000. Silverton, Oregon: Oregon Center for Public Policy.

Oregon Economic and Community Development Department (2000). Regional Investment. Salem: Oregon Economic and Community Development Department.

Oregon Progress Board (2000) State of the Environment. (<http://www.econ.state.or.us/opb/index.htm>) accessed on-line, December 2000.

Oregon Progress Board (1999). County Data Book. (<http://www.econ.state.or.us/opb/index.htm>) accessed on-line, July 2000.

Portland Development Commission (2000). Five Year Business Plan 2000-2004. Portland: City of Portland.

Portland Development Commission (1999). Five Year Business Plan 1999-2003. Portland: City of Portland.

Portland Development Commission (1998). Lents Town Center Urban Renewal Plan. Portland: City of Portland.

Washington County (2000) Community Development Block Grant Plan. July 1, 2000 – June 30, 2003. Office of Community Development Washington County, Oregon

Washington County, Oregon.(2000) City of Beaverton. Consolidated Plan FY 2000-2004. July 1, 2000 – June 30, 2005. May 2000

Washington County, Oregon. (1995) City of Beaverton. Housing and Community Development Plan. July 1, 1995-June 3-, 2000

Washington County Consolidated Planning (1999). Focus Group Research Results & Recommended Strategic Priorities. Conducted for Washington County Department of Housing Services. Conducted by: Campbell DeLong Resources, Inc.





**Oregon Business Development Commission Meeting**  
**September 5, 2014**  
**1:00 pm – 2:00 pm**  
**Two World Trade Center**  
**Plaza Conference Room – Ground Floor**  
**121 SW Salmon**  
**Portland OR 97204**

**AGENDA**

<b>Time</b>	<b>Item</b>	<b>Presenter</b>
1:00 pm – 1:05 pm	Welcome and Introductions	Chair Flynn
1:05 pm – 1:10 pm	Review Proposed Meeting Minutes July 25 Action: Approval of Minutes	Chair Flynn
1:10 pm – 1:35 pm	Washington County/INTEL SIP Application Action: Determination of Eligibility	Sean Robbins, OBDD Art Fish, OBDD Jill Eiland, INTEL Jim McCauley, Washington County
1:35 pm – 1:50 pm	Public Comment	Chair Flynn
1:50 pm - 2:00 pm	Other Business <ul style="list-style-type: none"> <li>• Next Meeting: November 21</li> <li>• Location: TBD</li> </ul>	Chair Flynn
2:00 pm	Adjourn	Chair Flynn

Unanticipated agenda items may or may not be included.

The meeting location is accessible to persons with disabilities. A request for an interpreter for the hearing impaired or for other accommodations should be made at least 48 hours before the meeting to: Suzy Miller at (503) 986-0106.



## **2013-2015 Manufacturing Workforce Plan**

for the City of Portland, Multnomah, Washington,  
Clackamas, Clark, Cowlitz and Wahkiakum Counties





## Over the next decade the regional manufacturing sector is projected to need to replace more than 30,000 workers

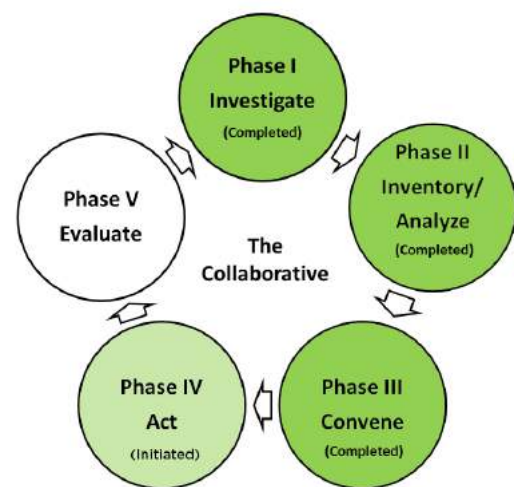
### Why a Regional Plan?

There are a variety of good public and private efforts underway to improve the quality of the regional manufacturing workforce. The challenge is that these efforts often work in isolation which diminishes the overall impact to the industry. The fact is the magnitude of the challenge requires multiple stakeholders to work together to have a meaningful and sustainable impact on the supply of well-trained manufacturing workers.

The Columbia-Willamette Workforce Collaborative is a partnership that delivers a unified approach to serve industry, support economic development, and guide public workforce investments in the Portland-Vancouver Metropolitan area. We work with industry to identify and remove barriers that stand in the way of cultivating and sustaining a skilled workforce.

### Collaborative Model

Our 5 step business model directly involves industry in the design, development, delivery and oversight of regional workforce programs and services.



### Driven by the Industries We Serve

Manufacturers provide jobs, spark innovation, and spur productivity giving our region a competitive edge. Despite high unemployment, manufacturers still struggle to find qualified local workers.

Recognizing the critical role manufacturers play in the local economy, we began working with industry to pinpoint their key workforce challenges and develop strategies that would move the needle. After engaging over 160 industry members through a combination of surveys, meetings and focus groups, three major themes surfaced:

- ***Manufacturers are concerned about the quality and number of young workers entering the industry.***
- ***Available labor does not have the skills needed for current and projected jobs.***
- ***Small manufacturers need greater access to continuous improvement training.***



# PLAN GOALS

Under the guidance of local companies, we developed a three-point plan to aggressively address manufacturing's workforce challenges.



## 1. Building a Labor Pipeline by Attracting Interested, Committed Youth

- Outcomes:**
- Develop and implement a career exposure campaign targeting youth
  - Convene a regional Career Technical Education (CTE) industry advisory group to give manufacturers a coordinated way to inform and influence regional CTE programs
  - Support **100** opportunities for youth internships in manufacturing occupations
  - Certify manufacturing skills competencies of **200** youth
  - Create **1,000** manufacturing career-related learning experiences

## 2. Finding Work-Ready Candidates Now

- Outcomes:**
- Create a certified work-ready workforce based on industry identified skill competencies
  - Establish a manufacturing hiring pool of **2000** job seekers who meet industry standards
  - Achieve a **75%** fill rate for all jobs recruited from the pool
  - Create a tool for quality assurance and continuous improvement

## 3. Strengthening the Manufacturing Community

- Outcomes:**
- Create opportunities for continuous improvement training that are accessible to small manufactures
  - Sponsor **8** industry training events
  - Support continuous improvement training for **50** small manufacturers
  - Connect **25** companies to more intensive lean coaching services

### Columbia-Willamette Manufacturing Industry Panel

**Panel Chairperson:**  
Elizabeth King, ESCO Corp.

**Collaborative Manufacturing Manager:** Jesse Aronson, Worksystems, Inc.

#### Industry Partners:

- Marks Metal
- Blount, Inc.
- HW Metals, Inc.
- ESCO Corp.
- SAM Medical Products
- Imperial Mfg.
- American Precision Industries
- Madden Industrial Craftsmen
- Benchmade
- Linear Technology
- Vigor Industrial
- Leupold & Stevens
- Boeing
- Sunset Manufacturing
- Enoch Manufacturing
- Silver Eagle Manufacturing
- Oregon Iron Works
- Leatherman Tool Group
- Liberty Metal Fab
- Manufacturing 21
- Pacific NW Defense Coalition
- Small Parts Manufacturing



## COLLABORATIVE PARTNERS

Portland Development Commission  
Columbia River Economic Development Council  
Greater Portland Inc.  
Business Oregon  
Clackamas Community College  
Clark College  
Lower Columbia College  
Mt. Hood Community College  
Portland Community College  
K-12 Career Technical Education  
Oregon Manufacturing Extension Partnership  
Impact Washington  
WorkSource Oregon and Washington  
Community Based Organizations

## Questions?

Jesse Aronson  
Worksystems, Inc.  
1618 SW First Ave. Ste 450  
Portland, OR 97201  
503.478.7324  
[jaronson@worksystems.org](mailto:jaronson@worksystems.org)



## **2014 STRATEGIC INVESTMENT PROGRAM AGREEMENT**

Washington County, a political subdivision of the State of Oregon (the “County”), the City of Hillsboro, a municipal corporation (the “City”), and Intel Corporation (“Intel”), enter into this Strategic Investment Program (“SIP”) Agreement (the “2014 SIP Agreement”).

### **RECITALS**

A. The 1993 Oregon Legislature established the SIP to promote industrial competitiveness. The program was significantly revised by the 1995 Legislature, in particular to remove the requirement that State revenue bonds be issued in association with a SIP. Additional statutory refinements were made in 2003. The key provisions are codified at ORS 307.123 and ORS 285C.600 – 285C.620.

B. The SIP encourages counties and cities to enter into agreements with key industries to attract and retain industrial investment and employment. In exchange for limits on ad valorem property taxation, counties receive a community service fee and may negotiate such additional terms and conditions as are deemed to be in the public interest.

C. The parties previously have entered into SIP agreements that have resulted in significant benefits to Intel, the County, the City, and the public generally.

D. On March 21, 2014, Intel notified the County and the City that it wanted to enter into formal negotiations to develop a new SIP agreement. Intel also has provided to the County a copy of the Oregon Business Development Department (“OBDD”) required draft SIP application. The final SIP application will be submitted to the OBDD once the parties have fulfilled their requirements under State law and regulations. The SIP application requested that Intel and the County enter into a SIP Agreement to provide a framework for potential additional Intel investment in Oregon of up to \$100 billion over a



thirty (30) year period commencing around the time when the current SIP agreement (“2005 SIP”) between Intel and the County approaches or reaches the limits of its current investment ceiling. The higher investment amount in this 2014 SIP Agreement reflects the accelerating cost of the research and development of new technologies, and the significantly increased cost of building, equipping, and retooling semiconductor factories with the latest technology. The intent of this 2014 SIP Agreement is to extend the competitive tax structure in Washington County that is essential for Intel to provide high-value, family wage jobs in Oregon and continue to contribute to the state’s quality of life.

E. In general terms, Intel’s investment will consist primarily of proposed investments in semiconductor manufacturing equipment and facilities to promote job retention of its semiconductor manufacturing and semiconductor technology development work force. Intel envisions employment retention and growth consistent with that Agreement dated December 6, 2013 between Intel and the State of Oregon, pertaining to income tax certainty.

F. Capital expenditures made under this 2014 SIP Agreement will take place in the City or the existing Aloha and Ronler Intel campuses, including, but not limited to, facilities that were the subject of the SIP agreements previously approved in 1994, 1999 and 2005 by the County, the City, and the State of Oregon (“Prior SIPs”). These new capital expenditures may include semiconductor manufacturing and semiconductor technology development facilities, machinery and equipment, land for these facilities, and directly related support facilities and office buildings. Any such capital expenditures will require and be made through additional spending beyond the scope of the Prior SIPs and in excess of the dollar amounts approved for the Prior SIPs.

G. The OBDD has issued revised administrative rules implementing the statutory provisions (OAR 123-623-1000 through 123-623-2000).

H. The County and Intel have provided public information and an opportunity for public input regarding the SIP generally and Intel's 2014 SIP application specifically, including a formal public hearing on this 2014 SIP Agreement held on [Date TBD, 2014].

I. This 2014 SIP Agreement provides the terms and conditions under which the County agrees to recommend to the State of Oregon that the 2014 SIP application be approved and tax abatement be granted for semiconductor manufacturing and semiconductor technology development machinery, equipment, and facilities as described herein and as provided by law in exchange for performance by Intel of the obligations herein.

## **TERMS AND CONDITIONS**

Now, therefore, in consideration of the following mutual promises, the parties agree as follows:

### **1. Project and Investment Definition and Scope.**

1.1 The "Project" shall consist of investments in semiconductor manufacturing and semiconductor technology development facilities, machinery and equipment, land for these facilities, directly related personal property, and directly related support facilities and office buildings. It further includes repairs, replacements, modernization, renovations and remodeling of existing buildings, structures, machinery and equipment, fixtures and furnishings, and supplies as well as future additions to such buildings or structures. The Project will be located on land zoned and planned, at the time of development, to allow semiconductor manufacturing, technology development, and related structures as a permitted

use within the City, as well as, but not limited to, such land at Intel's existing Aloha and Ronler Acre campuses. The Project shall consist of a maximum of \$100 billion in investment or investments. An investment under the Project will be a semiconductor manufacturing or semiconductor technology development investment, or both, in furtherance of the Project as defined by Intel and communicated in advance to the County and the City (an "Investment"). Each Investment is a separate "eligible project" as that term is used in ORS 285C.600(2). The approximate dollar amount and scope of an Investment under the Project must be defined with enough specificity that the Investment may be differentiated from expenditures under Prior SIPs or prior Investments under this 2014 SIP Agreement and with enough specificity that the County and the City may determine the timing and scope of the Investment so as to properly apply the SIP property tax partial exemption to each Investment. Each Investment definition will be reviewed and approved by the County. This review and approval will be limited to determining whether the Investment conforms to this Agreement and the definition is adequate for proper administration of the SIP as provided in this paragraph. There may be one or several Investments during the term of this 2014 SIP Agreement, which term shall be a period of thirty (30) years from the execution of this 2014 SIP Agreement by all parties, unless terminated earlier pursuant to Section 13. The first such Investment shall commence prior to the tenth (10<sup>th</sup>) anniversary of the execution of this 2014 SIP Agreement.

1.2 In the event that Intel establishes a dollar amount for an Investment in the definition of an Investment and upon completion of the Investment the actual capital expenditures for that Investment are less than the definition amount, Intel may allocate the unspent dollar amount to a future Investment by giving notice to that effect to the County. The Project will not include:



- a. an “existing project,” defined as property previously owned or leased by Intel at any location prior to commencement of the Project, or any property within or comprising a previously approved SIP project that received a prior SIP property tax partial exemption. However, repairs, replacements, modernization, renovations, and remodeling of existing buildings, structures, machinery and equipment, fixtures and furnishings, as well as future additions to buildings or structures, all as provided in OAR 123-623-1700, to that property are permitted to be in the Project, provided they are directly related to semiconductor manufacturing and semiconductor technology development;
- b. any investment outside of the geographic confines described above;
- c. any structures in addition to those described in the Project definition;
- d. any expenditure deemed not to constitute a component of an “eligible project” pursuant to the administrative rules of the OBDD; and
- e. property other than that which directly relates to semiconductor manufacturing and semiconductor technology development (*e.g.*, the Project does not include investment in a new business group, Internet development, product marketing, etc).

2. **SIP Partial Exemption Period.** Each Investment will be eligible for the 15-year partial tax exemption allowed pursuant to ORS 285C.606(1) and ORS 307.123 and the

administrative rules adopted thereunder. Each Investment will be fully taxed on the first \$100 million of real market value within the Investment (increased annually for growth at the rate of three percent) pursuant to ORS 307.123(1). Each Investment will be subject to the obligation to pay the Community Service Fee (“CSF”) pursuant to ORS 285C.609(4)(b). The period of the partial tax exemption for each Investment shall, pursuant to ORS 307.123(1)(b) commence on the earlier of: (i) the date that the Investment is certified for occupancy or, if no certificate of occupancy is issued, the date the Investment is used to produce a product for sale; or (ii) the expiration of the exemption for commercial facilities under construction under ORS 307.330. The partial tax exemption for each Investment shall have a duration of fifteen (15) years, except that if an Investment commences during the last fifteen (15) years of the thirty (30) year term of this 2014 SIP Agreement that Investment shall continue to receive the partial tax abatement and shall continue to be obligated to pay any taxes, fees, or other payments required under this 2014 SIP Agreement only until the end of the thirty (30) year term of this 2014 SIP Agreement.

**3. Allocation among SIPs.** Intel shall be responsible for informing the County whether eligible expenditures should be allocated to the tax accounts for the 2005 SIP or this 2014 SIP Agreement. Once the 2005 SIP has reached its project spending limit or time limitation, all eligible expenditures by Intel thereafter shall be allocated to this 2014 SIP Agreement. The County shall comply unless directed otherwise by the Department of Revenue. The intent of the parties is to permit Intel to maximize the tax advantages provided for by each SIP, but Intel is solely responsible for its allocation decisions. To the extent practicable, the County shall inform Intel if Intel has failed to properly allocate expenditures or the County is unsure of Intel’s allocation. The default allocation shall be to

the 2005 SIP unless Intel directs otherwise in writing within thirty (30) days of the notice from the County. Intel agrees that capital expenditures included in an Investment, including the costs of any individual new building or reconstructed building commenced during the period in which the 2005 SIP and this 2014 SIP overlap, shall be allocated to one SIP only and not be divided between or allocated in part to both the 2005 SIP and the 2014 SIP. Further, Intel agrees that a capital expenditure for a land purchase, a building, or an item of equipment or process support system shall be allocated to only one Investment and not allocated between Investments. It is understood by the parties that an allocation may be subject to review and approval of the Oregon Department of Revenue (“DOR”) and that County has no control over decisions of the DOR regarding tax exemptions and related matters.

**4. Conditions Precedent.** The following are conditions precedent to the obligations set forth herein:

4.1 The City’s approval of this 2014 SIP Agreement.

4.2 A determination by the OBDD, or its designee, that the Project and each Investment as defined herein are eligible for the tax exemption provided in ORS 285C.606, ORS 307.123, and OBDD Administrative Rules.

**5. Intel Obligations.**

5.1 Guaranteed Annual Payment (“GAP”). After Intel first receives a SIP property tax exemption pursuant to this Agreement, Intel shall pay to the County the sum of \$2,870,000 on December 1 of each year starting December 1, 2025 and continuing thereafter until December 1, 2044 or the date this 2014 SIP Agreement terminates under Section 13, whichever is earlier, subject to the



following. If this 2014 SIP Agreement terminates in 2044 before December 1, 2044, due to the 30<sup>th</sup> anniversary of this 2014 SIP Agreement occurring earlier in 2044, the GAP payment due in 2044 is due within thirty (30) days prior to that 30<sup>th</sup> anniversary. If this 2014 SIP Agreement terminates as provided in Section 13.2, Intel's obligation to make GAP payments stops. GAP shall be prorated for the period December 1 to November 30 to the date of termination of this Agreement. GAP is due and payable without regard to investment levels or other circumstances once Intel first receives a SIP property tax exemption under this 2014 SIP Agreement. GAP is in addition to, and not in lieu of, any taxes or fees paid by Intel, nor is it a credit against any taxes or fees.

5.2 Ad Valorem Property Taxes. Unless Oregon law provides otherwise, the first \$100 million in real market value for each Investment, increased annually for growth at the rate of three percent (3%), shall be taxable at its assessed value as provided by law. The real market value of the Investment in excess of the amount of real market value referred to in the preceding sentence shall be exempt from ad valorem taxation as provided by State law and rules. For each Investment, the above described ad valorem taxes payable by Intel shall be the "Investment's Taxes Payable."

5.3 Community Service Fee (CSF). Each year that Intel receives a SIP property tax partial exemption for a given Investment under the Project, Intel shall pay to County a CSF for that Investment, as provided by ORS 285C.609 (4) (b) (B), equal to twenty-five percent (25%) of the property taxes exempted in each tax year on each Investment, but not exceeding \$2 million in any one year for each

Investment. On or about Nov. 15, County shall provide Intel with a statement describing its calculations and the amount due and Intel shall pay within thirty (30) days thereafter. Intel may challenge the determination as provided in Section 8.

5.4 Fee in Lieu of Property Taxes. Each tax year that Intel receives a SIP property tax exemption for a given Investment under the Project, Intel shall pay to the County a fee on the assessed value of any Land and Buildings (as defined below), included in that Investment based on the formula set forth below as of July 1. On or about November 15, County shall provide Intel with a statement of the amount due and Intel shall pay no later than thirty (30) days thereafter. This fee shall be for each Investment. It shall be determined each year as follows:

$$\begin{array}{rcl}
 \text{Fee In Lieu} & = & (\text{Investment's Taxes} \\
 \text{for an Investment} & & \text{Payable for an Investment}) \\
 & & \text{Plus: Investment's CSF} \\
 & & \text{Multiplied by: (Total of all} \\
 & & \text{Investments' cumulative} \\
 & & \text{expenditures under the 2014} \\
 & & \text{SIP Agreement)} \\
 & \div & \\
 & & \$100 \text{ Billion}
 \end{array}$$

The following is an example for illustration of the above formula:

1. For the year in question, assume:

$$\begin{array}{rcl}
 \text{Investment's Taxes Payable} & = & \$2,000,000 \\
 \text{(Based on taxable \$100M)} & & \\
 \\
 \text{Investment's CSF} & = & \$2,000,000 \\
 \\
 \text{Total of all Investments' cumulative expenditures} & = & \$6,000,000,000
 \end{array}$$

$$2. \text{ Fee In Lieu} = \$2,000,000$$

$$\begin{array}{rcl}
 & + & \frac{\$2,000,000}{\$4,000,000} \\
 \text{Multiplied by} & & \$6,000,000,000 \div \\
 & & \$100,000,000,000 = .06 \\
 = & & \$240,000
 \end{array}$$

In no event, however, shall this fee be less than the amount of property taxes that would have been due on any Land or Buildings within that Investment assuming no SIP partial tax exemption (*i.e.*, the assessed value of any Land and Buildings in the Investment times the total tax rate for the subject year). Land and Buildings eligible for the construction in progress tax exemption pursuant to ORS 307.330 shall not be included for purposes of determining the minimum fee in lieu or formulaic fee in lieu under this paragraph.

It is understood by the parties that, in general terms:

- a. "Land" includes land acquired by Intel after execution of this 2014 SIP Agreement and any excavation or grading, storm sewers, sanitary sewers, water and gas plumbing, and electric lines;
- b. "Buildings" include footprint excavation, foundation, frame, wall, roof, utilities, all interior building finish, site improvements (paving, lighting, and landscaping), and indirect costs. Utilities that support the building environment, such as HVAC for building comfort, are not process support for manufacturing and research processes. "Buildings" does not



include any Machinery and Equipment used in the manufacturing or research activities occurring in the Buildings, including but not limited to: electrical systems, air and gas handling systems, HVAC and similar systems that control heat and humidity, water and wastewater systems, and other systems necessary for the manufacturing and research processes;

- c. “Machinery and Equipment” includes all manufacturing and process tools, all process support equipment and all foundations, plumbing, electrical, freight, and installation costs for such items.
- d. “Personal Property” includes all office and production area furniture, fixtures, desktop portable tools and equipment, plus non-licensed wheel vehicles and trailers.

Intel shall file all property tax returns required by law, listing all property in each Investment in the same manner as if no SIP tax exemption applied. Cumulative expenditures for the Investment are the total cost of all property as listed (including, for example, property for an exemption) subject to the right of the County or DOR to correct any under-valuation, omitted property or other reporting errors. The cost shall be summarized by year and separated between Land, Buildings, Machinery and Equipment and Personal Property consistent with the definitions in this Section and, to the extent not inconsistent, the

Memorandum of Understanding referenced in Section 16 of this Agreement. In the event of any conflict between this Agreement and the MOU referenced in Section 16, this Agreement controls.

In the event that any statutes, administrative rules or court decisions regarding classification of property or otherwise applicable to the implementation of the provisions of this Section 5.4 are changed after the effective date of this Agreement, the parties will seek to have DOR apply the provisions of this Section 5.4 notwithstanding such changes. Should the DOR be unable or unwilling to apply the terms of this Section 5.4 in light of such changes, however, then the changes shall control in the event of a conflict.

County will provide Intel with a statement describing its calculations and the amount due. Intel may challenge the County's determination as provided in Section 8. The parties will cooperate reasonably and in good faith to provide all necessary documentation and take such steps as are necessary to calculate this fee.

5.5 First Source Agreement. Intel shall enter into a first source hiring agreement with an appropriate third party acceptable to the County in substantially the form currently in place for the 2005 SIP. Washington County is to be designated a third party beneficiary of the agreement and is entitled to enforce its terms. The parties may designate a different provider for this service by letter agreement.

5.6 Charitable Fee. As consideration for the County agreeing to enter into this Agreement in advance of Project commencement by Intel, Intel will pay \$100,000.00 annually for six (6) consecutive years, commencing on the execution date of this 2014 SIP Agreement and each July 1 thereafter. This obligation applies regardless of whether Intel receives a SIP property tax exemption under this 2014 SIP Agreement for any of those years. These funds shall be earmarked for public or private non-profit organizations fulfilling a public purpose in Washington County. The County Administrator shall select the eligible recipient(s) subject to Intel's prior approval for consistency with Intel's Code of Conduct and any other applicable policies.

5.7 SIP Application. Intel is responsible for filing an application with the State of Oregon as provided in ORS 285C.612 and the applicable administrative rules. Intel shall file the application within sixty (60) days of execution of this 2014 SIP Agreement.

**6. County Obligations.**

6.1 Within fifteen (15) days of the County's approval of this 2014 SIP Agreement, the County shall request that the OBDD determine that the Land, Buildings, Machinery and Equipment and Personal Property constituting the Project, and each constituent Investment as determined and subject to the terms herein, be granted a partial exemption from ad valorem property taxation for a period of 15 years for each Investment as provided in ORS 307.123, beginning on:



- The date the Investment is certified for occupancy or, if no certificate of occupancy is issued, the date the property is used to produce a product for sale; or
- The expiration of the exemption for commercial facilities under construction under ORS 307.330.

Provided, however, that no Investment shall be eligible for partial tax exemption on or after the date that is thirty (30) years from the date this 2014 SIP Agreement is executed.

6.2 County shall be solely responsible for payment of any CSF due the City or any other jurisdiction.

## **7. Joint Obligations.**

In addition to the other obligations set forth in this Agreement, the parties shall:

7.1. Cooperate with the City, the OBDD, and the DOR to secure approval of the SIP and take such steps as may, from time to time, be necessary to maintain the partial property tax exemption.

7.2 Provide such information and resources to each other as may be reasonably necessary to ensure proper calculation of the amounts due under this 2014 SIP Agreement.

7.3 The parties agree to develop a Memorandum of Understanding to document how the parties can address infrastructure impacts associated with the expenditures contemplated under this 2014 SIP Agreement, including seeking federal, state, and local funding for such infrastructure needs, as appropriate. Nothing in this

provision authorizes the parties to agree to terms that modify, contract, or expand the Project, or any terms that would be inconsistent with this 2014 SIP Agreement.

**8. Remedies of Intel.**

8.1 Intel may challenge the County's calculation of any payment amount due to the County pursuant to this 2014 SIP Agreement by filing a written objection on or before the due date for the payment. The objection shall be accompanied by payment in full of the amount claimed by the County to be due and a statement of the basis for the challenge. The County shall deposit the amount in a trust and agency account and shall have fifteen (15) days to review the objection and issue a determination, together with any refund it concludes is required. Failure of the County to respond shall be deemed a denial. This process shall be a prerequisite to Intel exercising any other remedies for contesting the amount due to the County.

8.2 Intel may institute proceedings in the Circuit Court for Washington County, the Oregon Tax Court, or Federal District Court for Oregon, as appropriate, to challenge any amounts due claimed by the County or to seek specific performance of this 2014 SIP Agreement in the event of breach by the County. In the event that the Court determines that a refund is due Intel, the County shall pay the amount due, together with interest at the rate actually earned by the County during the interim.

8.3 Nothing herein shall limit or restrict Intel from challenging its assessed valuation or amount due for ad valorem property taxes in the same manner as any other taxpayer.

8.4 Intel shall not be required to pay any of the fees set forth herein with respect to an Investment for any year that it has paid ad valorem property taxes on the full assessed value of the Investment within the Project due to cancellation or disqualification of the SIP property tax exemption.

**9. Remedies of County.**

9.1 Late Payment of Any Fee. Failure of Intel to make payment in full of any amount due under this 2014 SIP Agreement by the due date shall result in penalty and interest being charged on the past due balance in the same amount as is provided by law for late payment of ad valorem property taxes.

9.2 Failure to Pay the Community Service Fee. The parties acknowledge that payment of the CSF is a statutory prerequisite to approval of a partial property tax exemption. If Intel fails to pay the CSF for an Investment by the end of the tax year in which it is due, the tax exemption may be revoked as to that Investment as provided in ORS 307.123(6), and the property within that Investment will be fully taxable for the following year and for each subsequent tax year for which the fee remains unpaid. If an unpaid CSF is paid after the exemption is revoked, the property will again be eligible for the partial property tax exemption, beginning with the tax year after the payment is made. Loss of a partial tax exemption for an Investment due to Intel's failure to pay the CSF does not relieve Intel of its obligation to make GAP payments. The failure by Intel to make a payment of the CSF due with respect to an Investment does not cause the termination of this 2014 SIP Agreement under Section 13.

9.3 Failure to Pay Any Other Fee. The County may declare a default if any other fee remains unpaid by the end of the tax year in which the fee is due. Intel shall



have thirty (30) days to cure the default or provide its reasons why it is not in default. The County shall have thirty (30) days to review the information and notify Intel of its final determination. Intel may appeal an adverse final determination by filing an action in the Washington County Circuit Court, the Oregon Tax Court, or the Federal District Court for Oregon, as appropriate, within sixty (60) days of the notice. Intel must pay to County the full amount in dispute before filing a challenge. County shall refund the amount, with interest at the rate actually earned by the County, if the court finds in favor of Intel. If Intel fails to pay the amount determined by the County to be due, the County may file an action to collect the entire amount of the unpaid fee, with penalties and interest as provided by law for taxes or as otherwise permitted by law. The failure to pay any other fee with respect to an Investment does not cause the termination of this 2014 SIP Agreement pursuant to Section 13.

9.4 Board Discretion. The Board of Commissioners may, in its sole discretion, waive any contractual remedy, other than the remedy for failure to pay the CSF, if it finds that Intel has made a reasonable effort to comply but has been precluded from complying for reasons beyond its immediate control.

**10. Ad Valorem Property Taxes.** Except as provided otherwise, nothing herein shall govern the manner of and process for assessment, payment, or collection of ad valorem real property taxes on the first \$100 million of real market value of each Investment included in the Project, increased annually for growth at the rate of 3 percent (3%) or on property outside the definition of the Project.

**11. Documentation.** Intel shall have the burden of documenting compliance with this 2014 SIP Agreement. Intel shall provide County such documentation or information as County requires verifying compliance.

**12. Tax Limitations.** The parties acknowledge that the fee payments negotiated herein are authorized by law as requirements relating to the Project, do not constitute property taxes and are not subject to the limits under Section 11 or 11b, Article XI of the Oregon Constitution. Any increase in amounts paid resulting from a change in property values shall not be considered a change in tax or tax rate. Intel waives any claim, known or unknown, that these property tax limitations, or their implementing statutes, apply to the fees set forth in this 2014 SIP Agreement.

**13. Termination.** This 2014 SIP Agreement shall commence on the date of execution and shall terminate on the earlier of:

13.1 The thirtieth (30<sup>th</sup>) anniversary of the mutual execution of this 2014 SIP Agreement, or

13.2 The date when the partial tax exemption under Section 2 on the Project ends and the cumulative total of all Investment or Investments made under this 2014 SIP Agreement on the Project equals \$100 billion.

**14. Miscellaneous Provisions.**

14.1 The laws of the State of Oregon shall govern this 2014 SIP Agreement. Any action or suit commenced in connection with this contract shall be in the Circuit Court of Washington County, Oregon Tax Court, or the Federal District Court for Oregon, as appropriate.

14.2 No person shall be denied or subjected to discrimination in receipt of the benefits of any services or activities made possible by or resulting from this 2014 SIP Agreement on the grounds of race, color, religion, gender, sexual orientation, national origin, disability, age, or marital status.

14.3 The terms herein shall be given their normal and customary meaning, except that terms relating to the payment of property taxes and fees in lieu of taxes shall be construed consistently with the tax laws and rules of the State of Oregon. No provision shall be construed against a party on the basis that the party drafted the provision.

14.4 The City is a signatory of this 2014 SIP Agreement as relates to any portion of the Project within the City; provided, however, that nothing herein gives the City any claim or right to the proceeds of this 2014 SIP Agreement except as provided by law. Distribution of the proceeds shall be governed by a separate agreement between the County and the City. Nothing in this 2014 SIP Agreement is intended to give, or shall be construed to give or provide any benefit or right, whether directly, indirectly, or otherwise, to third persons unless such third persons are individually identified by name herein and expressly described as intended beneficiaries of the terms of this 2014 SIP Agreement.

14.5 Time is of the essence for this 2014 SIP Agreement. The failure of either party to enforce any provisions of this 2014 SIP Agreement shall not constitute a waiver by that party of that or any other provision.

14.6 The terms, conditions, representations, and all warranties contained in this 2014 SIP Agreement shall survive the termination or expiration of this 2014 SIP Agreement.

14.7 This 2014 SIP Agreement shall bind the successors and assigns of the parties. In the event of a purchase, merger, or other restructuring, including but not limited to a divestiture of the Washington County based semi-conductor manufacturing and semi-conductor technology components of Intel, whether voluntary or not, Intel shall make every effort to ensure that the obligations set forth herein are not impaired. The County shall cooperate and assist Intel in fulfilling this obligation.

**15. Change of Law.** To the extent permitted by law, changes in statutes or DOR or OBDD administrative rules enacted after the date of this 2014 SIP Agreement shall not affect the terms of this 2014 SIP Agreement. Nothing in this provision, however, obligates the County or the City to contest or refuse to comply with a change that the County or the City deem, in their sole discretion, to be mandatory or otherwise govern.

**16. Memorandum of Understanding.** The parties and the DOR have developed a Memorandum of Understanding under the 2005 SIP to address administration of the SIP, including but not limited to:

16.1 Definitional details relating to what property qualifies as directly related personal property and directly related support facilities and office buildings.

16.2 Proper categorization of mixed-use facilities.

16.3 Reporting requirements.

16.4 Valuation methodology for buildings.



The parties agree to work with the DOR to review and, where appropriate, amend that Memorandum of Understanding so as to properly implement this 2014 SIP Agreement. Nothing in this provision authorizes the parties to agree to terms that modify, contract, or expand the definition of the Project, or any terms that would be inconsistent with this 2014 SIP Agreement.

**17. Waiver and Hold Harmless.**

17.1 Except as provided in Section 8, Intel hereby **WAIVES and RELINQUISHES** any claim, right, title or interest in any ad valorem property tax payments made under Section 5.2 of this Agreement and shall not be entitled to any refund of said payments, in the event that the DOR or a court of competent jurisdiction determines that the levy of ad valorem property taxes on any property in accordance with this 2014 SIP Agreement is inconsistent with or not authorized by Oregon law.

17.2 Intel shall hold harmless, indemnify and defend the County and the City, their respective officers, employees and agents for and against any and all claims arising out of any approval of an ad valorem property tax partial exemption provided in accordance with this 2014 SIP Agreement in the event that the exemption is deemed by a court of competent jurisdiction to be inconsistent with or not authorized by Oregon law, upon final resolution, including any appeal or petition of such litigation. The County shall not be obligated to contest any such determination but shall not object to, and shall reasonably cooperate with, any such contest by Intel.

17.3 Nothing in the foregoing paragraphs 17.1 and 17.2, is intended to limit Intel's remedies set forth in Section 8, other than the right to challenge the levy of ad valorem taxes or to a refund of ad valorem taxes as provided in Paragraph 17.1 and 17.2, respectively.

**18. Severability.** If any clause or provision of this 2014 SIP Agreement is held to be invalid or unenforceable, the parties intend that the remainder of this 2014 SIP Agreement shall not be affected. It is the intent of the parties that, in the event a clause or provision is stricken, that there be added as part of this 2014 SIP Agreement a clause or provision as similar in terms as may be possible, legal, and enforceable so as to provide a comparable partial property tax exemption and comparable payments to the County as provided for in this 2014 SIP Agreement.

**19. Merger.** THIS 2014 SIP AGREEMENT CONSTITUTES THE COMPLETE AND EXCLUSIVE STATEMENT OF THE 2014 SIP AGREEMENT AMONG THE PARTIES AS REGARDS THE PROJECT AND SUPERSEDES ALL PRIOR AGREEMENTS OR PROPOSALS, ORAL OR WRITTEN, AND ALL OTHER COMMUNICATION BETWEEN THE PARTIES RELATING TO THE SUBJECT MATTER OF THIS 2014 SIP AGREEMENT. NO WAIVER, CONSENT, MODIFICATION, OR CHANGE OF TERMS OF THIS 2014 SIP AGREEMENT WILL BE BINDING ON ANY PARTY EXCEPT AS A WRITTEN ADDENDUM SIGNED BY AUTHORIZED AGENTS OF THE PARTIES. THIS 2014 SIP AGREEMENT, HOWEVER, IN NO WAY SUPERCEDES OR MODIFIES THE SIP AGREEMENTS ENTERED INTO BY THE PARTIES IN 1994, 1999 AND 2005.

**INTEL CORPORATION**

By: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Date: \_\_\_\_\_

**CITY OF HILLSBORO**

By: \_\_\_\_\_  
\_\_\_\_\_  
Mayor

Date: \_\_\_\_\_

**WASHINGTON COUNTY**

By: \_\_\_\_\_  
\_\_\_\_\_  
Chairman  
Board of County Commissioners

Date: \_\_\_\_\_

APPROVED AS TO FORM:

By: \_\_\_\_\_  
Alan Rappleyea  
County Counsel

**Current Oregon Strategic Investment Program (SIP) Projects based on 2015 Annual Employment Reports**

In order of original determination by the Oregon Business Development Commission following local process		Cumulative project investment by 2014	Total direct jobs in 2014 <sup>†</sup>	Average 2014			2013–14 Property Taxes <sup>§</sup>			Additional payments by firm in 2014	Net revenue loss locally <sup>¶</sup>
Business firm – Project name	County			Wage or salary	Compensation (w/benefits)	State personal income taxes <sup>‡</sup>	Current year of 15	Foregone on exempt property	Project taxes paid by firm		
Intel Corporation—SIP1999*	Washington	\$12,500,000,000	0	\$0	\$0	\$0	13th	\$21,745,194	\$2,288,639	\$8,265,840	\$9,782,671.02
Microchip Technology, Inc.—Microchip*	Multnomah	\$440,000,000	467	\$44,488	\$57,836	\$977,547	12th	\$722,659	\$2,211,048	\$202,667	\$397,139.97
Intel Corporation—SIP2005	Washington	\$9,050,000,000	9,277	\$127,501	\$170,708	\$73,568,582	4th	\$111,486,822	\$1,767,939	\$10,592,555	\$81,941,507.26
Georgia-Pacific Consumer Products LP— Wauna Paper Mil—PM#7	Clatsop	\$400,000,000	56	\$74,541	\$86,467	\$214,166	6th	\$2,044,371	\$273,313	\$500,000	\$1,196,827.93
Genentech USA, Inc.—Hillsboro Fabrication Facility	Washington	\$580,000,000	411	\$97,829	\$112,323	\$2,200,270	4th	\$2,880,039	\$1,868,945	\$895,659	\$1,494,773.37
EDP Renewable NA, LLC—Elkhorn Valley Wind Farm	Union	\$160,000,000	16	\$65,580	\$71,191	\$52,089	6th	\$601,799	\$262,011	\$200,600	\$298,893.17
Iberdrola Renewables, LLC—Klondike Wind Power III, LLC	Sherman	\$480,000,000	16	\$60,204	\$81,275	\$47,819	6th	\$4,891,007	\$463,521	\$2,151,195	\$1,908,340.81
Portland General Electric Company—Biglow Canyon Windfarm	Sherman	\$960,000,000	32	\$58,946	\$80,043	\$90,396	6th	\$11,681,275	\$477,075	\$6,425,925	\$3,269,533.25
Invenergy, LLC— Willow Creek Energy	Gilliam & Morrow	\$130,000,000	6	\$55,252	\$59,479	\$16,012	5th	\$980,710	\$368,071	\$309,218	\$504,771.30
Iberdrola Renewables, LLC—Hay Canyon & Star Point Wind Farms	Sherman	\$340,000,000	8	\$57,862	\$78,113	\$22,358	5th	\$2,365,591	\$450,049	\$1,274,205	\$689,235.53
Iberdrola Renewables, LLC—Pebble Springs & Leaning Juniper II A & B Wind Farms	Gilliam	\$560,000,000	12	\$54,940	\$74,168	\$31,843	5th	\$3,288,417	\$309,585	\$2,386,186	\$343,200.11
Exelon Wind, LLC—Echo Windfarms	Morrow	\$140,000,000	9	\$54,049	\$67,561	\$23,495	5th	\$470,641	\$388,874	\$411,922	-\$21,289.52
Eurus Energy America Corporation—Eurus Combine Hills II, LLC	Umatilla						4th	\$405,146	\$252,457	\$271,567	\$64,704.18
NEXTERA Energy Resources, LLC—Stateline 3 Wind	Umatilla	\$190,000,000	5	\$63,232	\$50,000	\$15,695	4th	\$991,417	\$379,314	\$425,599	\$397,277.11
Caithness Corporation—Shepherds Flats Wind Farms (Gilliam)	Gilliam						2nd	\$9,353,115	\$276,351	\$4,906,301	\$2,856,784.45
Caithness Corporation—Shepherds Flats Wind Farms (Morrow)	Morrow						2nd	\$4,012,005	\$399,833	\$1,837,671	\$1,492,293.15
<b>TOTAL / AVERAGE</b>		<b>\$27,810,000,000</b>	<b>10,363</b>	<b>\$121,248</b>	<b>\$161,409</b>	<b>\$77,372,841</b>		<b>\$177,920,208</b>	<b>\$12,437,025</b>	<b>\$41,057,110</b>	<b>\$106,616,663</b>

\* Two projects started exemption too long ago to be part of "gain-share" distributions to local governments, which is the purpose of the reports, rather than verification of any statutory hiring requirement.

† Newly created and retained positions reported as associated directly with the project, excluding jobs with or for construction, vendors, suppliers or on-site service providers.

‡ Estimated based on reported information using the latest average tax rates by income level from Department of Revenue tax statistics; does **not** include revenue associated with indirect employment or any induced/multiplier effect due to employee spending.

§ Latest property tax year ending on prior June 30; 15-year exemption is on project property in excess taxable portion, which begins at \$25 or \$100 million and rises 3% per year; taxes are on taxable portion and possibly other associated property.

¶ Foregone taxes reduced by payments, including statutory community service fee and locally negotiated amounts, and adjusted using standard factor of revenue loss—approximately one-sixth (17%) is generally shifted to other taxpayers under local taxing district levies.

Source: Business Oregon (Oregon Business Development Department). Some information redacted upon request of reporting firm.

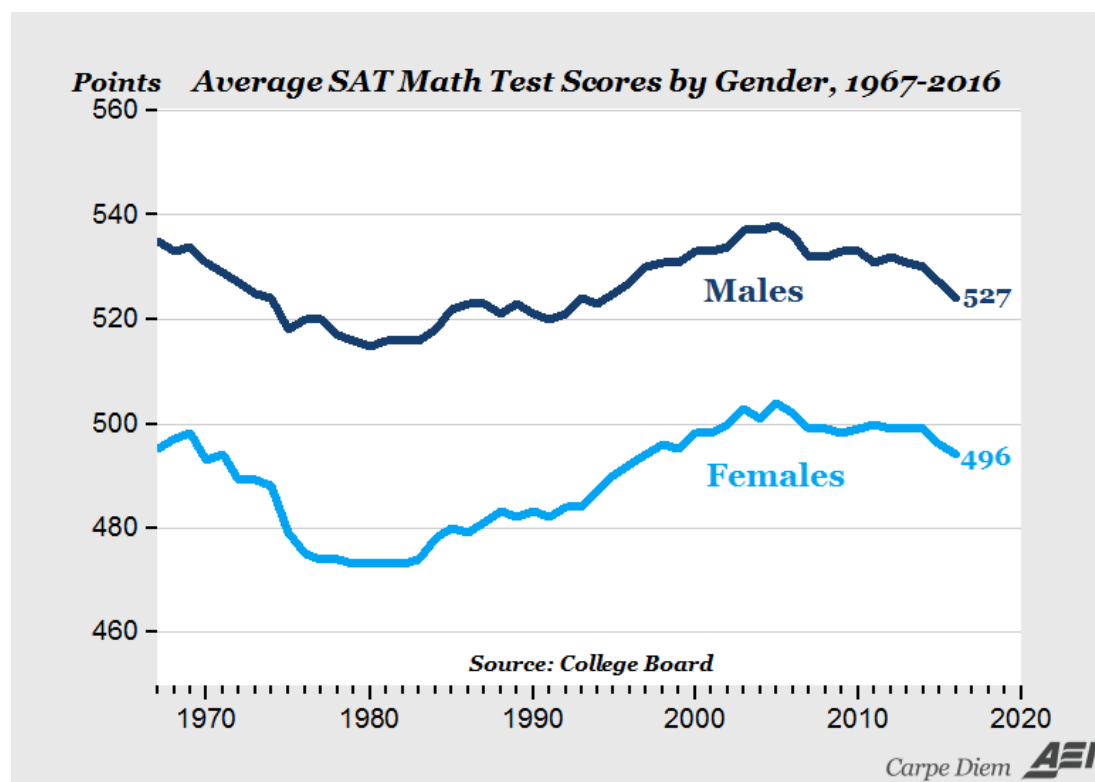




# 2016 SAT test results confirm pattern that's persisted for 50 years — high school boys are better at math than girls

**Mark J. Perry**

September 27, 2016 3:38 pm | *AEIdeas*



(<http://www.aei.org/wp-content/uploads/2016/09/satnew.png>)

The College Board released its [2016 SAT college-entrance test results today](https://secure-media.collegeboard.org/digitalServices/pdf/sat/total-group-2016.pdf), (<https://secure-media.collegeboard.org/digitalServices/pdf/sat/total-group-2016.pdf>) see report here from the Washington Post "[SAT scores fall modestly in a year of transition for college admission test](https://www.washingtonpost.com/local/education/sat-scores-fall-modestly-in-a-year-of-transition-for-college-admission-test/2016/09/26/3b5440d4-83ef-11e6-a3ef-f35afb41797f_story.html)" ([https://www.washingtonpost.com/local/education/sat-scores-fall-modestly-in-a-year-of-transition-for-college-admission-test/2016/09/26/3b5440d4-83ef-11e6-a3ef-f35afb41797f\\_story.html](https://www.washingtonpost.com/local/education/sat-scores-fall-modestly-in-a-year-of-transition-for-college-admission-test/2016/09/26/3b5440d4-83ef-11e6-a3ef-f35afb41797f_story.html)). As in past years, my main interest in the annual SAT test results is the ongoing gender gap in favor of boys for the SAT math test, and this year wasn't any different than previous years. Here's what this year's SAT math test results show:

1. Continuing an uninterrupted trend that dates back to at least 1967 (updated), **high school boys outperformed girls on the 2016 SAT math test with an average score of 524 points compared to the average score of 494 for females**, see chart above. The statistically significant 30-point male advantage this year on the SAT math test is slightly below the 31-point difference last year. Compared to the average math test score of 508 for all test-takers, high school boys scored 16 points above average while girls scored 14 points below average.

2. For the 117,067 students with SAT math scores in the highest 700-800 point range, high school boys represented 61.5% of those students (71,999) and the 45,068 girls in that group were 38.5% of the total. Stated differently, there were nearly 160 boys with SAT math scores between 700-800 points for every 100 girls with scores in that range. For the next highest 100-point range between 600-700 points for the 2016 SAT math test, there were about 120.4 boys with scores in that range for every 100 high school girls (54.6% boys vs. 45.4% girls).



**Morrison & Finley:** [Actually, SAT results don't confirm boys are better at math than girls](#)

(<https://www.aei.org/tag/competition-of-ideas/>)

(<http://www.aei.org/publication/sat-results-dont-confirm-boys-better-at-math-than-girls/>)

**Update:** Adjusting for the much greater number of female high school students who took the 2016 SAT (875,342) compared to males (762,247), we could also determine that only **5.1% of female test-takers** scored in the 700-800 point range on the SAT math test (45,068 total) compared to **9.4% of boys** (71,999) who scored in the highest range.

**2016 SAT Math Test Results by Gender and Ethnicity**

Ethnicity	Male	Female	Difference
American Indian	485	460	25
Asian	614	590	24
Black	430	422	8
Hispanic	468	441	27
Two or More Races	522	494	28
White	550	518	32
No Response	510	491	19
<b>Overall</b>	<b>524</b>	<b>494</b>	<b>30</b>

([http://www.aei.org/wp-](http://www.aei.org/wp-content/uploads/2016/09/sat2.png)

[content/uploads/2016/09/sat2.png](http://www.aei.org/wp-content/uploads/2016/09/sat2.png))

3. The **statistically significant difference in math test scores in favor of boys is consistent across all ethnic groups** as the table above shows. The smallest difference is an 8-point advantage in favor of boys for black high school students, and the biggest difference, interestingly, is a 32-point advantage for white male students compared to their female counterparts.

Q: How do we explain the persistent gender gap in favor of boys for mathematical aptitude across all ethnic groups, as demonstrated by their consistent out-performance on the SAT math test for more than 40 years?

One possible explanation for the fact that high school boys consistently score higher on average than girls on the math SAT test and outnumbered girls by 1.60-to-1 for test scores on the high end (700-800 points) in 2016, would be that high school boys are better students on average than high school girls and are better prepared in mathematics than their female classmates. But that explanation would be false, based on [College Board data for students taking the 2016 SAT test](https://secure-media.collegeboard.org/digitalServices/pdf/sat/total-group-2015.pdf) (<https://secure-media.collegeboard.org/digitalServices/pdf/sat/total-group-2015.pdf>):

4. For 2016 SAT test-takers, **high school girls had superior overall academic high school records compared to boys:** females represented 56% of the students in the top 10 percent of their graduating classes (Table 11), 60% of the students graduating with an A+ grade point average were female (Table 12), and high school girls graduated with a higher overall average GPA of 3.45 compared to a 3.30 average GPA for their male counterparts (Table 12). 5. High school girls were over-represented in **advanced AP/Honors math classes (55%) compared to boys (45%)**, and also in **advanced AP/Honors science classes by 56% to 44%** (Tables 14 and 15).

5. For those high school students taking **four years of high school mathematics**, girls were over-represented (55%) compared to boys (45%), and more of the students studying **natural sciences for four years** were female students (55%) than male (45%), see Table 15.

**Bottom Line:** Even though female high school students are better prepared academically than their male classmates on many different measures of academic success, both overall and for mathematics specifically, female high school students score significantly lower on the SAT math test, and the +30-point differences in test scores favoring males has persisted for several generations and exists across all ethnic groups. At the high-end of math performance, high school males significantly outperformed their female peers on the 2016 SAT math test by a ratio of 1.60-to-1 for scores between 700 and 800 (and 1.84-to-1 adjusted for the number of test-takers), and that outcome for superior male math performance on the high end of the distribution has persisted for more than four decades.

Despite the persistent, statistically significant differences in math performance by gender on the math SAT test that have continued for at least the last half century, we hear statements like this: "There just aren't gender differences anymore in math performance," according to [University of Wisconsin-Madison psychology professor Janet Hyde](http://phys.org/news136126991.html) (<http://phys.org/news136126991.html>), who says further that "parents and teachers need to revise their thoughts about this. Stereotypes are very, very resistant to change, but as a scientist I have to challenge them with data." Given the significant and persistent gender differences in SAT math test scores that have persisted over many generations across all ethnic groups, the scientific data about gender differences in math performance would seem to present a serious challenge to Professor Hyde's frequent claims that there are *no gender differences in math performance*.

Further, the fact that women are underrepresented in STEM occupations and hold only 26% of STEM jobs according to a [2013 Department of Commerce report](http://www.esa.doc.gov/sites/default/files/reports/documents/womeninstemagaptoinnovation8311.pdf) (<http://www.esa.doc.gov/sites/default/files/reports/documents/womeninstemagaptoinnovation8311.pdf>) certainly isn't because female students are being discouraged from studying math and science in high school. In fact, the evidence shows that females are excelling in math and science in high school – they outnumber males in AP/Honors math and science courses, and are more likely than their male counterparts to take four years of math and science courses.

Further, compared to boys, high school girls get better grades on average, and are far more likely to graduate in the top 10% of their high school classes, and are much more likely than boys to attend and graduate from college and go on to graduate schools. By all objective measures, girls have essentially all of the necessary ingredients that should result in greater representation in STEM fields like engineering and computer science except perhaps for one: **a huge, statistically significant and persistent 30-point gender gap on the SAT math test in favor of boys that has persisted for more than 40 years.** If there are some inherent gender differences for mathematical ability, as the huge and persistent gender differences for the math SAT test suggests, closing the STEM gender degree and job gaps may be a futile attempt in socially engineering an unnatural and unachievable outcome.

This article was found online at:  
<http://www.aei.org/publication/2016-sat-test-results-confirm-pattern-thats-persisted-for-45-years-high-school-boys-are-better-at-math-than-girls/>



## GREATER PORTLAND 2020

# JOIN THE DIVERSITY IN LEADERSHIP INITIATIVE

### WHAT

An effort to increase the number of positions in leadership held by diverse populations in the Greater Portland region, the Diversity in Leadership is one of the first lead, long-term initiatives of Greater Portland 2020.

By partnering with the region's businesses, public sector organizations, and nonprofits, the region's leadership is committed to supporting leadership development programs (in collaboration with universities, organizations and companies) that will help individuals from diverse backgrounds to develop skills and advance in their career.

### WHY

To realize the advantages of our increasingly diverse community—namely, the capabilities, experiences and cultures that directly contribute to productivity, innovation and creativity—effectively increasing Greater Portland's global competitiveness.

### HOW

Companies across the region will commit to sharing the composition of their leadership ranks and work with communities of color and service providers to co-develop solutions to recruit, retain and elevate diverse leaders.

Annual progress in advancing diversity in leadership will be reported, and as new organizations participate, a more comprehensive picture of diversity in the region's leadership will emerge.

Components of the Diversity in Leadership:

- Establishing a baseline measurement of diversity in leadership in organizations throughout the region
- Identifying meaningful, measurable outcomes as well as the strategies to achieve them
- Sharing and celebrating best practices

### ABOUT GREATER PORTLAND 2020

In 2015, Greater Portland Inc convened business, education and civic leaders to develop an action-oriented, five-year comprehensive economic development strategy.

The result is the region's first economic growth plan - Greater Portland 2020 - built on the foundation of latest economic development thinking and that calls for economic prosperity for all across the region.

The three core strategies of the plan promote people, business and place infrastructure to chart a course for sustainable economic growth, focused on tradable sectors and innovation, with an intentional approach to diversity and inclusion, and committed to equity.





# FREQUENTLY ASKED QUESTIONS

## WHY IS GREATER PORTLAND 2020 FOCUSED ON DIVERSITY AND INCLUSION?

The new economy is knowledge and innovation-driven. Productive firms and industries are embracing changing demographics and actively recruiting and retaining diverse talent to compete successfully in the new economy.

Today in Greater Portland, 84 percent of residents ages 50 to 64 are white, compared to 64 percent of residents ages 5 to 19. But our rapidly growing population of young people – especially Hispanics, African Americans and Pacific Islanders – is lagging behind in terms of educational attainment, economic prosperity and access to leadership opportunities. Advancing diversity and inclusion is a basic principle guiding the Greater Portland 2020 Plan.

## HOW WILL MY ORGANIZATION'S DIVERSITY DATA BE USED IN THE INITIATIVE?

Workforce diversity data will be used to establish a baseline and to set a long-term diversity in leadership target for the region. Data will be collected, aggregated and analyzed by an independent survey research firm. No company-level data will be released to the public. Companies may request customized benchmarking data for peer-to-peer and industry comparisons.

## OUR COMPANY HAS A DIVERSITY PROGRAM. WHY SHOULD WE JOIN 2020'S DIVERSITY INITIATIVE?

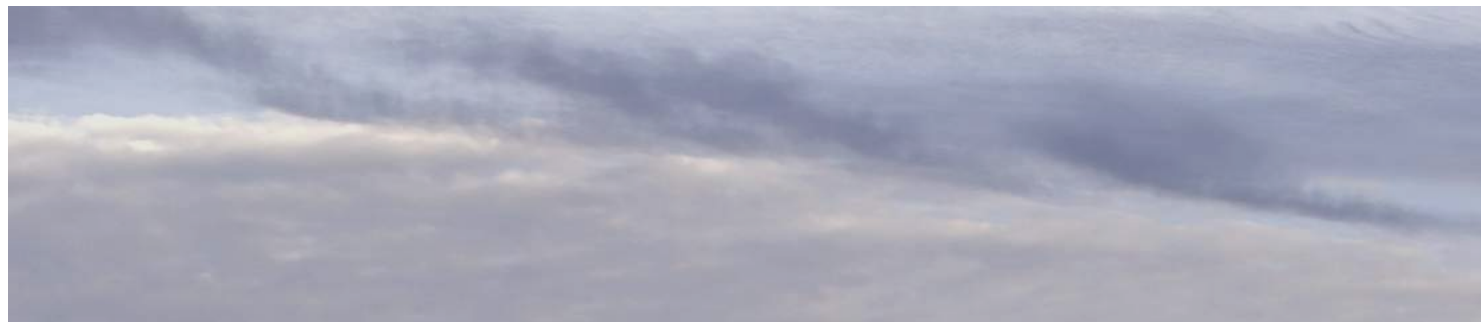
By joining this initiative you and your organization are committing to a regional vision for increasing diverse talent and leaders. The 2020 diversity initiative will signal to the world that Greater Portland continues to lead as a progressive place to start and grow businesses and a place of vibrant culture and quality of life.

## WHAT VALUE DOES THE INITIATIVE BRING TO MY DIVERSITY PROGRAM?

Ultimately the initiative is about creating a network of private, public, and civic organizations willing to collectively address diversity and inclusion. Through this network we will highlight existing resources and tools, forge stronger connections among stakeholders and promote and support community-based organizations working with communities of color and other culturally specific populations.

## HOW IS THIS INITIATIVE DIFFERENT FROM EXISTING ONES?

The 2020 diversity initiative is establishing a broad-based movement, which means every firm, industry and organization in the bi-state, 7-county region is eligible to join, be counted and contribute to the regional roadmap for diversity and inclusion. It is complementary to existing programs such as the Tech Diversity Pledge, Partners in Diversity and others.



Economic Prosperity for All

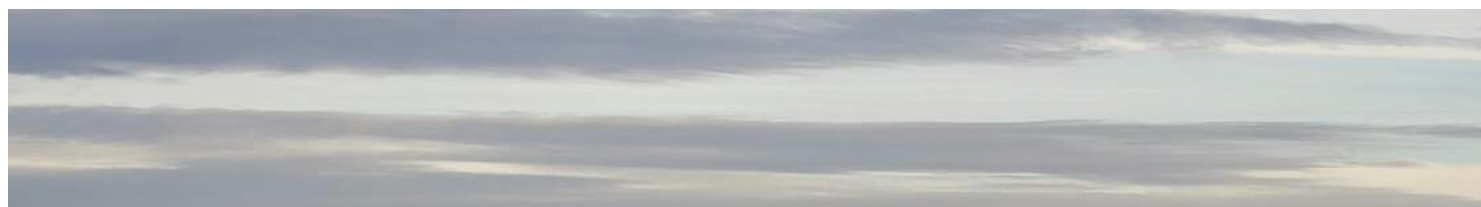
ABOUT

INITIATIVES

STRATEGIES

DATA & REPORTS

NEWS



## GREATER PORTLAND 2020

Greater Portland 2020 is a five-year action plan to achieve *Economic Prosperity for the All* by aligning business, education and civic leaders around regional economic priorities. We live in an incredibly vibrant and economically diverse region. Our pioneering spirit and penchant for 'creating new' inspires and attracts people from around the world, but our region faces challenges.

---

## GPEDD OVERVIEW

The Greater Portland Economic Development District (GPEDD), staffed by Greater Portland Inc, is a not-for-profit organization working in Clackamas, Multnomah, and Washington counties in Oregon and Clark County in Washington. GPEDD is funded primarily

through grants awarded by the U.S. Department of Commerce's Economic Development Administration (EDA).

## SUPPORTED BY



Economic Prosperity for All

ABOUT

INITIATIVES

STRATEGIES

DATA & REPORTS

NEWS



Portland General Electric



Beaverton Hills  
OREGON

JPMORGAN CHASE & CO.



Metrolink  
PORT OF PORTLAND  
Possibility. In every direction.



## CATALYSTS



SKANSKA  
PRODUCE ROW  
PROPERTY MANAGEMENT

**ADDITIONAL SUPPORT FROM SMALL CITY  
CONSORTIUM**

## GOVERNANCE



Economic Prosperity for All

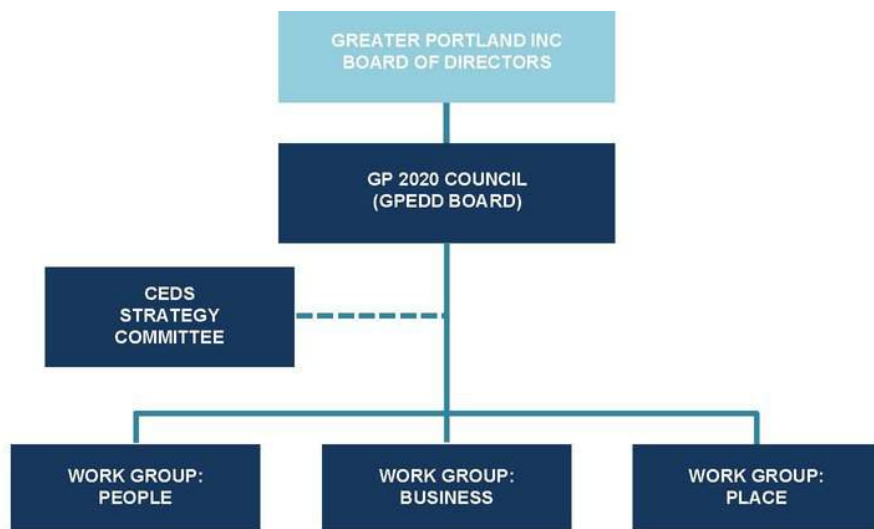
ABOUT

INITIATIVES

STRATEGIES

DATA & REPORTS

NEWS



## COUNCIL & WORK GROUP MEMBERS

GP2020 COUNCIL

PEOPLE WORK GROUP



CEDS STRATEGY  
COMMITTEE

BUSINESS WORK GROUP

PLACE WORK GROUP



Economic Prosperity for All

ABOUT

INITIATIVES

STRATEGIES

DATA & REPORTS

NEWS

## CONTACT US

info@greaterportland2020.com | (503) 445-8065 | © 2016 Greater Portland  
Inc

Last week I sat down with [Jared Wiener](#), Software Industry Liaison at the [Portland Development Commission](#), to talk about PDC's new [Tech Diversity Pledge](#). The pledge, which was announced late last month, is a five point plan that seeks to create collective action and accountability to address the underrepresentation of women and people of color in Portland's tech industry. By signing the pledge, companies agree to participate in activities that fall under each point.

**The five points include:**

1. Partner with groups in Portland that can assist with hiring and career advancement for underrepresented communities;
2. Create and implement strategies to increase hiring of women and people of color, from intern programs to full-time positions at all levels within our organizations;
3. Educate staff on unconscious workplace biases and implement specific actions designed to alleviate them;
4. Provide internal development and progression programs, and ensure underrepresented employees can access these programs; and
5. Share our collective data on the demographic representation within our offices in the Portland metro area of gender and race.

This pledge and the public / private partnership behind it have captured the attention of major national news outlets, including USA Today. Because we are also dedicated to fostering diversity in our industry here at DevelopmentNow, I just had to interview Jared in person about this exciting new initiative.

**Kathryn Brown: Tell me about the Portland Development Commission, and how the Portland Tech Diversity Pledge came about.**

Jared Wiener: The Portland Development Commission is structured around three main components:

1. Our work in the central city. This is very place-based. We are often involved in redevelopment

projects in specific buildings. We're also an investor in the streetcar line.

2. Our work in the neighborhood. We're involved in infrastructure and small businesses on the neighborhood level. We work on both economic and urban development in the neighborhoods.
3. Our work in city-wide economic development. This is the team that I work on. This includes helping industries grow, create jobs, and increase economic impact in the city.



*Jared Wiener, Software Industry  
Liaison at the Portland Development  
Commission*

Specifically, my work is focused on the software industry. For the better part of the last five years, the economic development piece of the work at PDC has been our primary objective. It makes sense when you look at that timeline – the economic downturn that happened. This became a very big focus of most cities around the country.

PDC works in five year cycles. While we have been focused on economic growth across the board, the next five years will be all about more inclusive growth and widely shared

prosperity. This is a challenge that not just Portland is facing – it's being faced all across America where you see a wider disparity between people who have economic resources and those who don't. That's a broader focus of our agency.

Given this focus, we think we can make a big difference in the software industry here in Portland. There is a lot of movement right now in tech around the big issues, including hiring quality talent and broadening that talent pool with more diverse choices. PDC is interested in doing that as well. So for the past six months, we've been discussing this with people in the software industry. What's come out of these discussions is a public / private diversity pledge. There was a real interest in working together to create a more diverse tech industry in Portland.

**When you had these initial meetings with your early partners, what was that like? How did you find your early partners?**

We had a lot of partners already: companies like Puppet Labs and Elemental Technologies are companies that we work with pretty regularly on different initiatives. So, we had a rolodex of companies to go to from the beginning. We got a small group of six CEOs around the table in January. There was a shared response that diversity in tech is something that we should be focused on. From there, we broadened the discussion. The next meeting had 15 folks, and then we were off to the races.

**Who helped draft the original five points in the Portland Tech Diversity Pledge?**

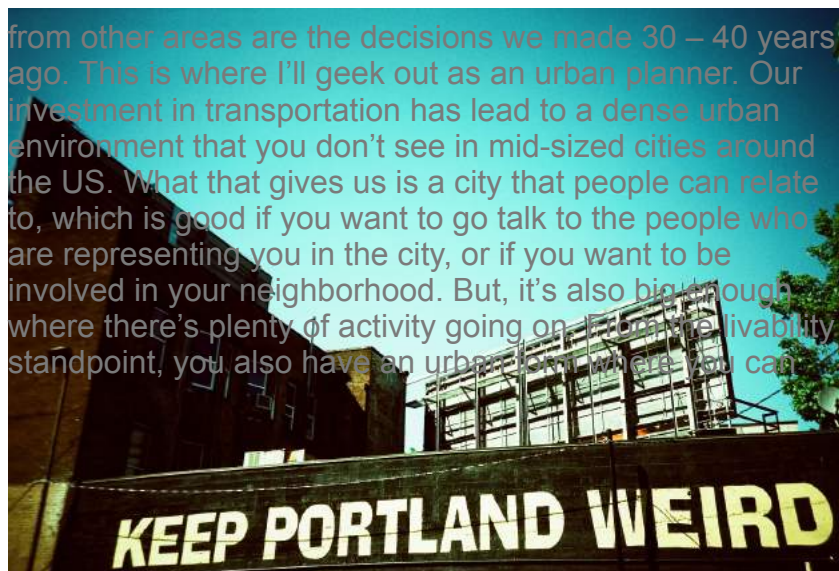
The companies who were at the table really working together on this are Puppet Labs, Elemental Technologies, Uncorked Studios, and Zapproved.

**What do you think is special about the Portland tech scene compared to every tech hub in the US? It seems like every city wants to brand itself as “the next Silicon Valley”.**

I don't think trying to be the next Silicon Valley is where our uniqueness lies. Portland has some things on the trendline that are very positive for our tech scene. Yes, we're not as big as Silicon Valley, we're not as big as San Francisco, and I would argue that we don't want to be. We want to be a better Portland, and I think the tech industry can be a driver of that.

When you look at Portland, the things that separate us





walk around and look at interesting things.

Really we have a mid-sized city that feels like a large town. When you look at this through an industry perspective, that's something that separates Portland from other parts of the country.

**I've noticed recently that there are many organic and planned meeting spaces, kind of like mini hubs, that are emerging in Portland. For example, DevelopmentNow is in the Central Eastside Industrial District. The neighborhood is definitely changing from the city's warehouse district to a clustering of creative agencies taking on early leases in that area, planning for future development. What do you think about these smaller hubs that are emerging within the Portland tech scene?**

From the city's perspective, we don't want to stymie that growth. In 20 years from now, we want a Portland that is celebrated as much as it is today. What you are seeing in your neighborhood is a mix between things that the public sector is playing a role in, for example the Eastside Exchange building. That building is a technology hub and it's nearly 100% leased. We also see this in the private market as well. The role of the public sector when it comes to this is being a catalyst for change where it wouldn't otherwise occur. When you look at (the new startup co-working space) CENTRL Office, that was a space that the private sector could activate on its own. It's in the heart of the Pearl. That's a really good indication of the work that the public sector did 10 – 15 years ago. We revitalized the Pearl District, and then the private sector can come in and successfully provide community resources at a market

rate. You can see these things take shape with the public intervention.

**Regarding diversity in the Portland tech scene – I hear company executives talk about the “pipeline problem” a lot. They say that they just can’t find a diverse talent pool. Do you think the Portland Tech Diversity Pledge addresses this?**

This is the heart of the challenge. I don’t think there’s any company out there that says, “I don’t want to hire women,” for example. But what happens is, they’ll hire people in their social network, or people that they know. There are studies that show that people tend to hire people that look and sound like themselves. So how do you break that cycle? This is a broader issue with how we operate as human beings. It’s a hard thing to solve, and it’s a challenge that’s not going to be solved overnight by any means.

But the way that you begin to solve this is to start saying overtly, “this status quo is not okay”. That’s one thing that the pledge does. There is an acknowledgement that there is a problem now – it’s a problem not just for society, but for the tech industry, and for individual companies. Companies currently are not able to hire enough employees, and they are not able to get diverse perspectives.

I sympathize with the hiring managers at these companies. Some of the companies that have signed the pledge have 20 – 30 open positions that they are trying to fill at any given time. It’s hard to take a step back and say, “How do we actually make a change and broaden who we hire? How do we do that from an outreach perspective?” when you are just so focused on filling the vacant positions to grow and be a successful company. That’s a role that I think the public sector can help support.

The great thing about technical positions is that you can train up for those positions fairly quickly. You can see this with all of the code schools that are coming into Portland. I think there is still a place for the traditional educational path, but the code schools do fill some of those needs. Here at PDC, we just announced that we will be offering these technical training schools a [grant opportunity](#) where the focus will be on outreach to under served communities in tech. The outcomes that we want to see as a result of these funds being used is outreach numbers, as well as enrollment in these training programs, and finally placement in jobs. While our funds will be used for the outreach piece of that, we’ll also be assessing how these organizations utilize other resources out in the community



to  
get  
peopl  
e into  
that  
final  
outco  
me  
that  
we're  
alwa  
ys  
inter  
ested  
in,  
whic

h is job placement and job success. The grant total will be \$30,000.

**Do you have specific numbers and goals in mind when it comes to evaluating job placement and job success?**

That is something that we will be looking at through the Tech Diversity Pledge. What we are trying to do is make meaningful impact in the short-term, with the understanding that this is a long-term systemic challenge. It's going to take a generation to really start to change the dynamic. Something that someone said pretty early on (in the Tech Diversity Pledge development process) that I thought was a really good perspective on this is that we won't see that horizon moment 2, 5, or even 10 years from now where we can all shake hands and say, "Yep, we've accomplished tech diversity. We are an inclusive industry now". It's going to be a constant thing that we continue to work on.

So when it comes to an actual number, I don't think we know that yet. We're just dipping our toe into the water when it comes to actually trying to change the dynamics in an impactful way. Part of this is going to be trial and error. We are going to see what happens in the initial stages, and we will continuously improve from there.

**What are three easy, small step that you think companies can take right now to move towards greater diversity?**

1. Talk about it. The first step that you can do within a company is to begin to talk about it. If your leadership team starts talking about it and showing that it's important, that will start to change the dynamic and the culture in a way that's impactful.

I'm speaking about this from our PDC's experience doing that over that last couple of years.

2. Track results. Second, companies should continuously track what they are doing, including the success or the failure they are having.
3. Build a culture on purpose. Finally, companies should be purposeful about the culture they are putting out there. Culture could be things like: are you providing opportunities for everyone to attend events and activities that are either work or quasi-work related? For example, going to play golf on a Saturday afternoon might not be something that a single mother can potentially do. Also, look at your company's hiring practices. Studies show that when you put together a hiring panel, the people that are on that panel oftentimes are what you will get as an end result. By that I mean, if you have four white males in their early twenties on a hiring panel, you're much more likely to have a candidate that is a white male in his early twenties as a result of that. Now conversely, if you put together a hiring panel that is diverse, you'll have more diverse candidates. I think this flows both ways. People who make hiring decisions are naturally more comfortable with people who are like them. That's sort of the way that we work psychologically. Also, as a candidate, if you are sitting across the table from people who look like you, you're much more likely to be comfortable than if you are sitting across the table from people who don't look like you.

**That's interesting because it goes back to one of the points in the five point plan (in the Tech Diversity Pledge) that we talked about previously, which is unconscious bias.**

Yes, talking about this issue is oftentimes uncomfortable. There has to be an acceptance with that if you really want to begin to make change. At the same time, it's not blaming any one person or any one organization for not being diverse enough. The focus really should be moving forward and less about looking back on what we've done wrong. We should be asking ourselves, what can we do that's better?

Written by **Kathryn Brown** -- July 8, 2015

Kathryn is a digital strategist and resident Apple fangirl. She's worked for fitness and social media startups in Boulder, Portland, and NYC. She has contributed to digital marketing campaigns for Amazon, Macy's, DailyBurn, Microsoft, Ford, Target, Xfinity, and Bloomberg. When she's not researching the next big thing in digital, you can find her walking around Portland talking to Siri on her Apple Watch.





**PORTLAND POLICE BUREAU**  
**GENERAL OFFENSE HARDCOPY**  
**(TRESPASSING)**  
**GO# 42 2015-241041**

*Off # 2323405-1*  
*Jacob Brown*

## Table of Contents

<b>Related Event GO# 42 2015-241041</b> .....	<b>1</b>
<b>Offense(s)</b> .....	<b>1</b>
<b>Related Event(s)</b> .....	<b>2</b>
<b>Related Person(s)</b> .....	<b>2</b>
1. ARREST CSTD # 1 - BARBER, BENJAMIN .....	2
2. RPTG PARTY # 1 - BONTRAGER, PETER MATTHEW .....	3
<b>Related Business(es)</b> .....	<b>4</b>
1. PREMISE # 1 - JAGUAR LANDROVER .....	4
<b>Related Narrative(s)</b> .....	<b>5</b>
1. NARRATIVE - TRESPASS 2 .....	5
2. [REPORT SNAPSHOT - SYSTEM USE ONLY] - Original Report by Patrol .....	6
<b>Related Clearance Information</b> .....	<b>10</b>
<b>Related Arrest(s)</b> .....	<b>11</b>
1. Related Arrest Report AB# 2015-8209 .....	11
<b>Related Attachment(s)</b> .....	<b>13</b>
1. BOOKING/FINGERPRINT CARD .....	13



## GENERAL OFFENSE HARDCOPY

(5707-0 TRESPASSING)

ARREST -  
MISDEMEANOR

## General Offense Information

Operational Status ARREST - MISDEMEANOR  
Reported On JUL-16-2015 (THU.) 1901  
Occurred On JUL-16-2015 (THU.) 1901  
Approved On JUL-16-2015 (THU.)  
Approved By 40399 - MIRAU, STEPHEN L  
Report Submitted 46083 - ADAMS, TRINA M  
By  
Org Unit CENTRAL  
Address 1419 NW QUIMBY ST  
Municipality PORTLAND  
County MULTNOMAH  
District CE Beat 810 Grid 85560  
Bias NONE (NO BIAS)  
Family Violence NO

## Offenses (Completed/Attempted)

Offense # 1 5707-0 TRESPASSING - COMPLETED  
Location OTHER COMMERCIAL BUSINESS  
Suspected Of Using NOT APPLICABLE



## GENERAL OFFENSE HARDCOPY

(5707-0 TRESPASSING)

ARREST -  
MISDEMEANOR

## Related Event(s)

1. CP 422015-241041
2. AB 422015-8209

## Related Person(s)

1. ARREST CSTD # 1 - BARBER, BENJAMIN

## CASE SPECIFIC INFORMATION

Sex MALE  
Race WHITE  
Date Of Birth JUN-07-1985  
Address 2637 SW WATER AVE  
Municipality PORTLAND  
State OREGON  
ZIP Code 97201  
District CE Zone 872 Grid 65005  
CELLULAR (971) 270-0855

## PERSON PARTICULARS

Ethnicity UNKNOWN  
Height 5'10  
Weight 165 LBS.  
Eye Color UNKNOWN  
Hair Color BROWN  
Hair Style SHORT

## MASTER NAME INDEX REFERENCE

Name BARBER, BENJAMIN JAY  
Sex MALE  
Race WHITE  
Date Of Birth JUN-07-1985  
Ethnicity UNKNOWN  
Address 2637 SW WATER AVE  
Municipality PORTLAND  
State OREGON  
County MULTNOMAH  
ZIP Code 97201  
District CE Zone 872 Grid 65005

## PHONE NUMBERS

**PORTLAND POLICE BUREAU**  
**GENERAL OFFENSE HARDCOPY**  
(5707-0 TRESPASSING)ARREST -  
MISDEMEANOR

HOME (971) 270-0855  
CELLULAR (971) 270-0855  
Email STARWORKS5@GMAIL.COM

**CHARGE SUMMARY****CHARGE # 1**

Offense Date JUL-16-2015 (THU.)  
Offense CRIMINAL TRESPASS II - COMPLETED  
Charge Statute OR 164.245  
Charge Severity C MISDEMEANOR  
Domestic Violence NO

**LINKAGE FACTORS**

Resident Status RESIDENT  
Age Range K - 30-49 YEARS  
Access To Firearm NO  
Offense 5707- 0 TRESPASSING - COMPLETED  
Arrest Date JUL-16-2015 (THU.)  
Arrest Type ARREST / BOOK / CIVIL HOLD

**2. RPTG PARTY # 1 - BONTRAGER, PETER MATTHEW****CASE SPECIFIC INFORMATION**

Sex MALE  
Race WHITE  
Address 1419 NW QUIMBY ST  
Municipality PORTLAND  
State OREGON  
ZIP Code 97209  
District CE Zone 810 Grid 85560

**PERSON PARTICULARS**

Ethnicity UNKNOWN

**LINKAGE FACTORS**

Resident Status UNKNOWN  
Age Range 0 - UNKNOWN





GENERAL OFFENSE HARDCOPY

(5707-0 TRESPASSING)

ARREST -  
MISDEMEANOR

Access To Firearm NO

## Related Business(es)

### 1. PREMISE # 1 - JAGUAR LANDROVER

**Address** 1419 NW QUIMBY ST

**Municipality** PORTLAND

**State** OREGON

**ZIP Code** 97209

**District** CE **Zone** 810 **Grid** 85560

**Type** BUSINESS - INFO TECH / SOFTWARE



## Related Text Page(s)

**Document** NARRATIVE

**Author** 46083 - ADAMS, TRINA M

**Subject** TRESPASS 2

**Related Date/Time** JUL-16-2015 (THU.) 1901

I responded to listed location, Jaguar/Landrover. There I saw Peter Bontrager telling Benjamin Barber that he had to leave the property. Barber was in the alcove on the north side of the building on the Jaguar/Landrover private property. Bontrager told me that they have trespassed Barber on multiple occasions. Bontrager insisted he wanted to prosecute Barber. Bontrager had seen Barber so many times that he was able to give me his name, age and home address.

Barber told me he believes women are trying to push white men out of the work place and that is one of the things he was protesting about tonight.

I put handcuffs on Barber, checked them for tightness and double locked them. I read Barber miranda to which he replied, "yes officer." I then asked Barber why he didn't leave when Bontrager asked him to. He said he wanted to protest like people to in malls. He said, "It's like telling white men to sit in the back of the bus." Barber told me he was willing to go to jail for his right to protest.

I gave security the victim's complaint for to give to Bontrager, as he had left prior to me leaving the scene. They assured me they would advise Bontrager to contact the district attorney in the morning.

I transported Barber to MCDC. He had no valuables.

PORTLAND POLICE BUREAU  
GENERAL OFFENSE HARDCOPY  
(5707-0 TRESPASSING)ARREST -  
MISDEMEANOR

## Related Text Page(s)

Document [REPORT SNAPSHOT - SYSTEM USE ONLY]

Author 46083 - ADAMS, TRINA M

Subject ORIGINAL REPORT BY PATROL

Related Date/Time JUL-16-2015 (THU.) 2123

Textual representation of the officer's MRE report

## REPORT INFORMATION

=====

Offense # : 241041  
Offense year : 2015  
Date occurred : 07-16-2015  
Time reported : 1901  
Status : M (ARREST - MISDEMEANOR)  
Family Violence : N  
Submitted by : 46083 (ADAMS, TRINA M (46083))  
Date reported : 07-16-2015  
Time reported : 1901  
Org Unit : CENT (CENTRAL)  
2nd off : ()  
Location : 1419 NW QUIMBY  
Municipality : PORT (PORTLAND)  
County : MU (MULTNOMAH)  
Bias : 88 (NONE (NO BIAS))  
Jurisdiction : 42

## IBR OFFENSE

=====

Offense code : 5707  
Offense extension : 0  
C/A : C  
Offender suspected of using co: N (NOT APPLICABLE)  
Location type codes : 96 (OTHER COMMERCIAL BUSINESS)

## NARRATIVE TEXT

=====

Subject : TRESPASS 2  
Type of text : NT (NARRATIVE)  
Author : 46083 (ADAMS, TRINA M)  
Related Date : 07-16-2015



PORTLAND POLICE BUREAU  
GENERAL OFFENSE HARDCOPY  
(5707-0 TRESPASSING)ARREST -  
MISDEMEANOR

Time : 1901

I responded to listed location, Jaguar/Landrover. There I saw Peter Bontrager telling Benjamin Barber that he had to leave the property. Barber was in the alcove on the north side of the building on the Jaguar/Landrover private property. Bontrager told me that they have trespassed Barber on multiple occasions. Bontrager insisted he wanted to prosecute Barber. Bontrager had seen Barber so many times that he was able to give me his name, age and home address.

Barber told me he believes women are trying to push white men out of the work place and that is one of the things he was protesting about tonight.

I put handcuffs on Barber, checked them for tightness and double locked them. I read Barber miranda to which he replied, "yes officer." I then asked Barber why he didn't leave when Bontrager asked him to. He said he wanted to protest like people to in malls. He said, "It's like telling white men to sit in the back of the bus." Barber told me he was willing to go to jail for his right to protest.

I gave security the victim's complaint for to give to Bontrager, as he had left prior to me leaving the scene. They assured me they would advise Bontrager to contact the district attorney in the morning.

I transported Barber to MCDC. He had no valuables.

## PERSON

=====  
Role : 3 (ARREST CSTD)  
No : 1  
Last Name : BARBER  
First : BENJAMIN  
Sex : M  
Address : 2637 SW WATER AVE  
City : PORTLAND  
State : OR (OREGON)  
DOB : 06-07-1985  
App. age : 30  
Race : W (WHITE)  
Cell phone (area code) : 971  
Cell phone : 270-0855  
Class : C (CLASS C - PASSENGER VEHICLES)  
Ethnicity : U (UNKNOWN)  
Height : 5'10  
Weight : 165  
Hair color : BRO (BROWN)  
Hair style : S (SHORT)  
Eye color : XXX (UNKNOWN)

PORTLAND POLICE BUREAU  
GENERAL OFFENSE HARDCOPY  
(5707-0 TRESPASSING)ARREST -  
MISDEMEANOR

## PERSON LINKAGE

=====

Resident status : R (RESIDENT)  
Age range : K (K - 30-49 YEARS)  
Arrest date : 07-16-2015  
Arrest type : O (ARREST / BOOK / CIVIL HOLD)  
Offense : 5707  
Ext : 0  
A/C : C  
Armed with : 1 (UNARMED)  
Access to firearms : N

## PERSON

=====

Role : 1 (VICTIM)  
No : 1  
Last Name : BONTRAGER  
First : PETER  
Second : MATTHEW  
Sex : M  
Address : 1419 NW QUIMBY  
City : PORTLAND  
State : OR (OREGON)  
Race : W (WHITE)  
Class : C (CLASS C - PASSENGER VEHICLES)  
Ethnicity : U (UNKNOWN)

## PERSON LINKAGE

=====

Resident status : U (UNKNOWN)  
Access to firearms : N

## VICTIM REL. LINKAGE FACTORS

=====

Relationship to offender : ST (VICTIM WAS STRANGER)  
Role : 3 (ARREST CSTD)  
# : 1

## VICTIM OFF. LINKAGE FACTORS

=====

Victim of offense code : 5707  
Ext : 0  
A/C : C





PORTLAND POLICE BUREAU  
GENERAL OFFENSE HARDCOPY  
(5707-0 TRESPASSING)

ARREST -  
MISDEMEANOR

INSTITUTION

=====  
Role : 2 (PREMISE)

No : 1

Business : JAGUAR LANDROVER

Address : 1419 NW QUIMBY

City : PORTLAND

State : OR (OREGON)

Business type : 98 (BUSINESS - INFO TECH / SOFTWARE)

Security : N



**PORTLAND POLICE BUREAU**  
**GENERAL OFFENSE HARDCOPY**  
(5707-0 TRESPASSING)

ARREST -  
MISDEMEANOR

## Clearance Information

**Agency** PORTLAND POLICE BUREAU  
**Cleared Status** CLEARED BY ARREST - NOT APPLICABLE  
**Cleared On** JUL-16-2015 (THU.)  
**Complainant/Victim** NO  
**Notified**

**PORTLAND POLICE BUREAU**  
**GENERAL OFFENSE HARDCOPY**  
(5707-0 TRESPASSING)ARREST -  
MISDEMEANOR**Related Arrest Report AB# 2015-8209**

Arrestee BARBER, BENJAMIN JAY  
Date Of Birth JUN-07-1985  
Related CD# 428110

**Arrest Information**

Status CHARGED  
Type Of Arrest ARREST / BOOK / CIVIL HOLD  
Reason For Arrest PROBABLE CAUSE  
Arrest Date JUL-16-2015 (THU.) 1901  
Approved By 33482 - PASSADORE, ANTHONY V  
Approval Date JUL-16-2015 (THU.)  
Rush File Required NO  
Booked Into Cell NO  
Arresting Officer(s) 46083 - ADAMS, TRINA M  
Summary Of Facts TRESPASS 2

**ARREST LOCATION**

Address 1419 NW QUIMBY ST  
Municipality PORTLAND  
County MULTNOMAH  
District CE Zone 810 Grid 85560  
SODA Zone NO

Drug Free Zone NO

**ADDITIONAL ARREST INFORMATION**

Case Screened NO  
Notify Victim On NO  
Release  
Juvenile NO  
Diversion NO  
Recommended  
Interpreter Needed NO  
Rights Given NO  
Mental Exam NO  
Required  
Statement Taken NO  
Fingerprinted NO  
CD Updated NO  
Family Notified NO  
Lawyer Called NO  
Meal Given NO

Photo Taken NO

Coffee Given NO

PORTLAND POLICE BUREAU  
GENERAL OFFENSE HARDCOPY  
(5707-0 TRESPASSING)ARREST -  
MISDEMEANOR

## Related Attachment - BOOKING/FINGERPRINT CARD

Description BOOKING

Reference Number

CASE NUMBER	PORTLAND POLICE BUREAU		ARREST / BOOKING		<input checked="" type="checkbox"/> ADULT <input type="checkbox"/> JUVENILE		PAGE OF 1/1	
	15-241041	CASE NUMBER 15-241041	REFER CASE NUMBER	CLASSIFICATION				
	DATE/TIME ARRESTED 07-16-2015 1901	TYPE OF CUSTODY PROBABLE CAUSE						
	LOCATION OF CUSTODY 1419 NW QUITMBY, PORTLAND				PRECINCT OF ARREST			
	ARREST SUMMARY TRESPASS 2							
	ARRESTEE							
	NAME OF PERSON IN CUSTODY (Last, First Middle) BARBER, BENJAMIN				CRN	SEX M	RACE W	DOB 06-07-1985 (30)
COPIES	HEIGHT 5'10	WEIGHT 165	HAIR BRO	EYES XXX	FACIAL HAIR			
	HOME ADDRESS 2637 SW WATER AVE				CITY PORTLAND	STATE OR	ZIP	HOME PHONE
	BUSINESS ADDRESS				WORK PHONE		MOBILE PHONE 971-270-0855	
	SCARS / MARKS / TATTOOS							
	DRIVERS LICENSE		STATE	SSN	SID NO.		FBI NO.	
	OTHER ID NUMBERS / REMARKS / UNIQUE FEATURES , SHORT HAIR STYLE							
	AST	INJURY INFORMATION						
	CHARGES							
	REFERRED TO				ADVISED OF RIGHTS?	RESISTED ARREST?	ASSAULTED OFFICER?	
	CASE NUMBER	ORS / ORD OR164.245	CHARGE / WARRANT NO. CRIMINAL TRESPASS II - CM			BAIL	COURT DATE / TIME	
ENTRY DPSST								
<input type="checkbox"/> Desk								
DPSST								
<input type="checkbox"/> Person								
DPSST								
FOR FORENSIC EVIDENCE DIVISION ONLY								
<input type="checkbox"/> Vehicles	NAME (Last, First Middle)							POB
DPSST	IDENTIFIERS LISTED BELOW	SEX	RACE	DOB	HEIGHT	WEIGHT	HAIR	EYES
	OTHER	MCL 1344695						
<input type="checkbox"/> Distribut.								FBI #
DPSST	PROCESSING	V	JAIL TECH	ID TECH	CM	TYPED	CHECKED	SID
	REPORTING OFFICER(S) / DPSST ADAMS, TRINA M 46083				ASSIGNMENT CENTRAL			

REG/IN BOOKING FORM SUBMIT DATE/TIME 07-16-2015 2012 CASE NUMBER 15-241041 PRINTED BY: ADAMS, TRINA M (46083)

v.150611



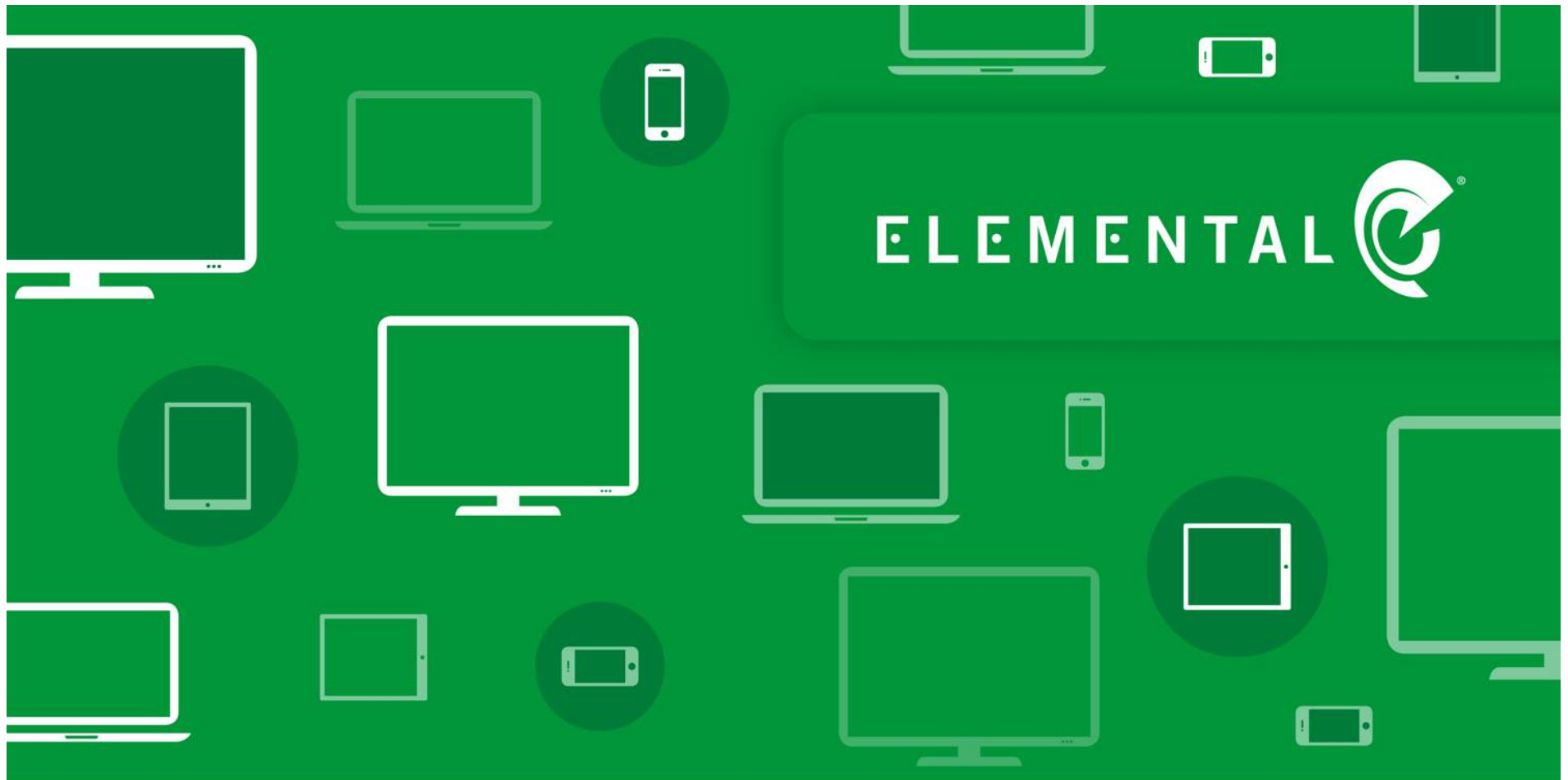


PORTLAND POLICE BUREAU  
GENERAL OFFENSE HARDCOPY  
(5707-0 TRESPASSING)

ARREST -  
MISDEMEANOR



1059-10 W 11 12 17



# DIVERSITY & INCLUSION IN TECHTOWN

Sam Blackman, CEO and Co-founder, Elemental  
GoGreen Portland - Oct. 5, 2016

*Elemental is an Amazon Web Services company*



# PERFECTING THE MEDIA EXPERIENCE

Elemental is the leading supplier of software-defined video solutions for multiscreen content delivery



Connecting viewers with content at massive scale

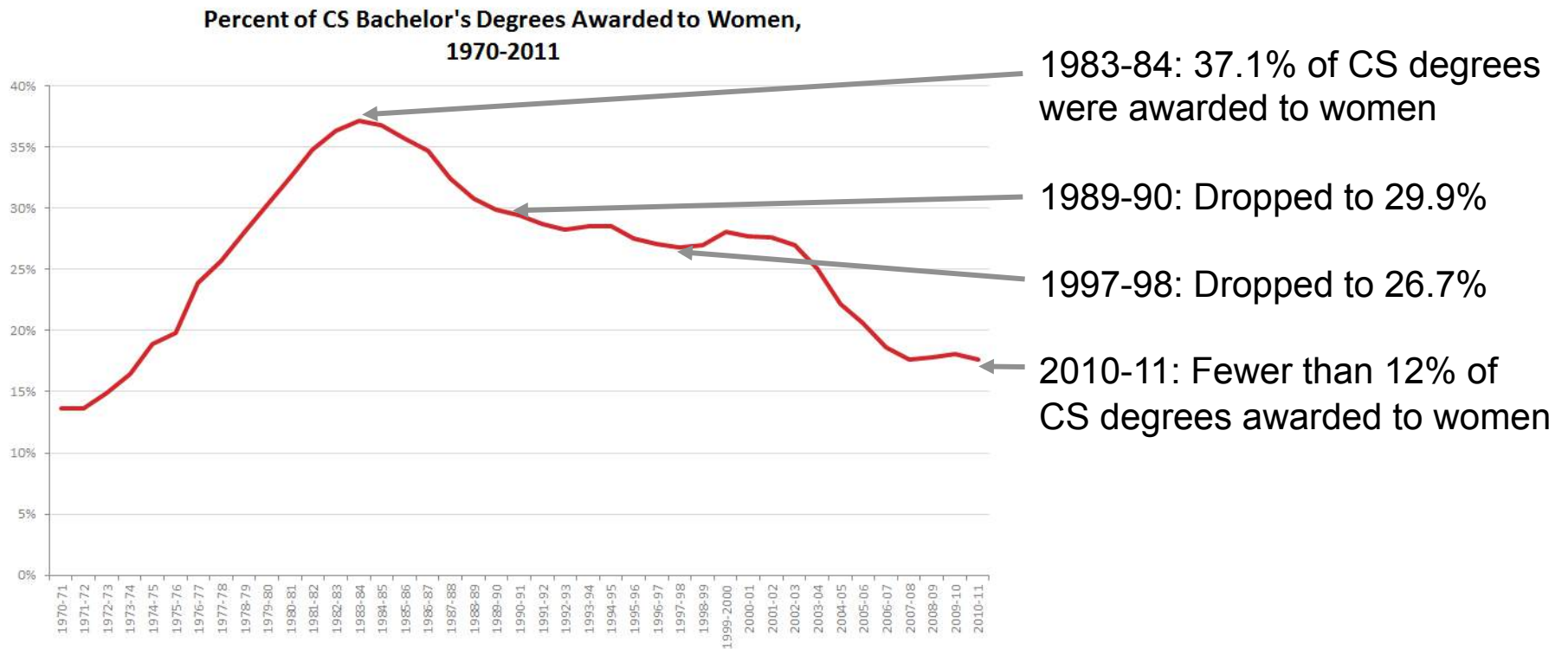
# OUR ACHILLES HEEL





# SYSTEMIC CHALLENGES ...

- The proportion of women in undergrad computer science education and IT workforces has declined since peaking in the mid-1980's



## ... AND UNDERREPRESENTATION STARTS EARLY



***From 2000 - 2011, the Portland-Vancouver metro area had the 25th largest drop in youth employment in the country, going from 44.4% to 26%. For low-income youth and youth of color, employment rates dip to 12%.***

*(Pictured: 4K 4Charity Tech Fair attendees from Rosemary Anderson High School)*

# WHAT TO DO?



# 2015 TECHTOWN DIVERSITY PLEDGE: HIRE

1. Partner with groups in Portland that can assist with hiring and career advancement for underrepresented communities.
2. Create and implement strategies to increase hiring of women and people of color, from intern programs to full-time positions at all levels within our organizations:
  - a) We partnered with Worksystems Inc. and the Portland Workforce Alliance to hire 6 SummerWorks high school internships for students from underrepresented populations to provide rotational learning experiences.
  - b) We also partnered the Emerging Leaders Internship Program and hired a college summer intern from their diverse candidate pool.
  - c) We partnered with Rosemary Anderson High School to raise money and awareness with our 4K 4Charity PDX Fun Run.



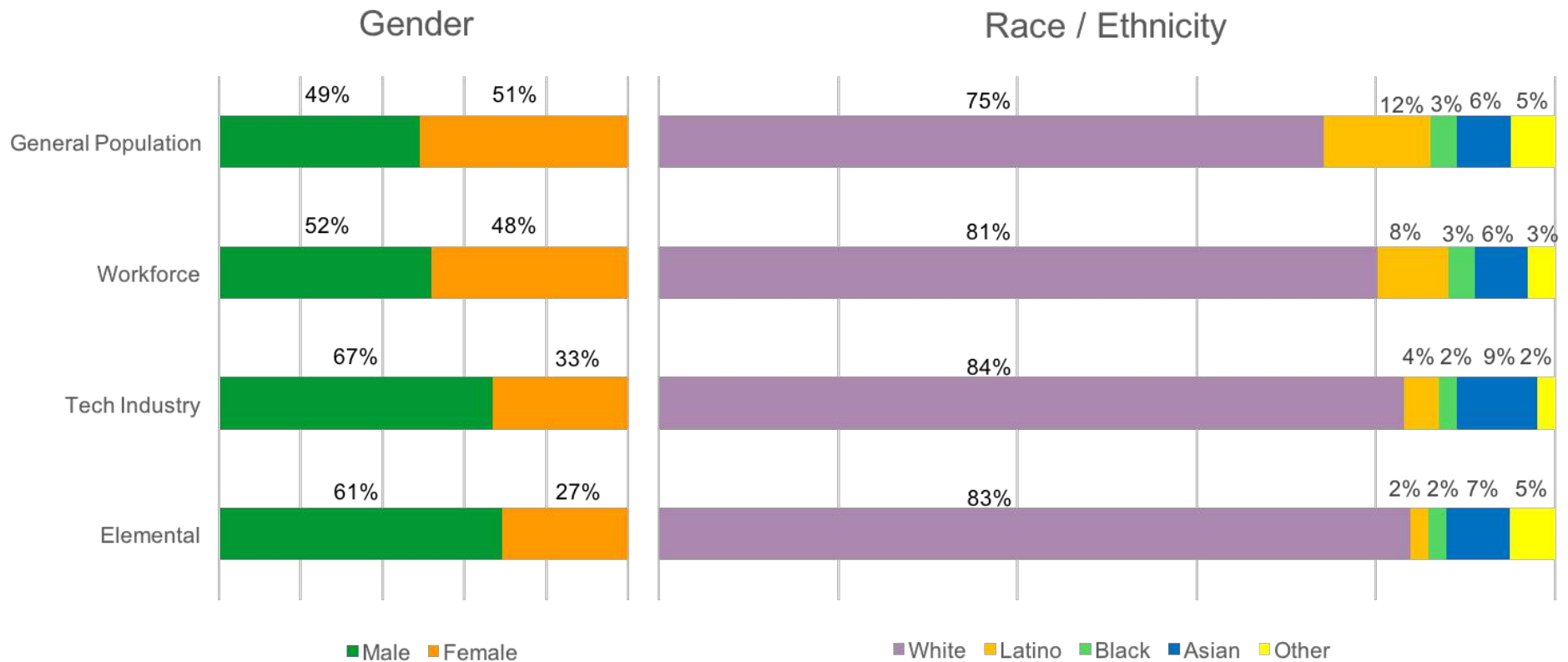


## 2015 TECHTOWN DIVERSITY PLEDGE: EDUCATE

3. Educate staff on unconscious workplace biases and implement specific actions designed to alleviate them.
4. Provide internal development and progression programs, and ensure underrepresented employees can access these programs:
  - a) We've incorporated a D&I session into Elemental New Hire Orientations to make all employees aware and take ownership.
  - b) We've created workshops on unconscious bias, allyship, and cultural agility.
  - c) Thanks to generous AWS policies, we now have extended (up to 5 months paid!) maternity and paternity leaves.
  - d) We've hired a Community & Diversity Program Manager, Nancy Garcia, to focus here and ensure we maintain steady progress.

# 2015 TECHTOWN DIVERSITY PLEDGE: QUANTIFY

5. Share our collective data on the demographic representation of gender and race within our offices in the Portland metro area.



Current Elemental demographic data

PDC first-year demographic data of original TechTown Diversity Pledge signing companies



# 4K 4CHARITY FUN RUN PDX 2016!

- 3 p.m. Wednesday, Oct. 12
- Waterfront Park – Naito Legacy Fountain
- Supports increased diversity and inclusion in technology with proceeds to help build up the technology curriculum at Rosemary Anderson High School
- Please sign up today:  
[www.4K4Charity.com/pdx](http://www.4K4Charity.com/pdx)
- *We can do even more this year!!*



## 2015 4K 4Charity Results

- +\$55,000 raised for RAHS
- +800 registrants
- +660 people on the course



**THANK YOU!**

**AND PLEASE JOIN US!**





benjamin barber <starworks5@gmail.com>

---

## Re: BOLI Civil Rights questionnaire

11 messages

---

**BOLI - CRD EMAIL** <crdemail@boli.state.or.us>  
To: "barberb@barberb.com" <barberb@barberb.com>

Thu, Feb 4, 2016 at 3:57 PM

Mr. Barber,

We have no current mailing address on file for you. We had an old mailing address we attempted to use and it was returned to sender. Attached is correspondence regarding the documentation/questionnaire that you sent to our office.

Thank you,

16-00107



## Bureau of Labor and Industries

### Civil Rights Division

800 NE Oregon St #1045


Portland, Oregon 97232

Tel: 971-673-0764

Fax: 971-673-0765

***Nothing in this communication is intended as legal advice. Any responses to specific questions are based on the facts as we understand them and are not intended to apply to any other situation. Neither can we make business decisions for you. If you need legal advice, please contact an attorney. The Oregon State Bar has an attorney referral service, which can be reached at 503-684-3763 or toll-free in Oregon at 800-452-7636.***

---

 BarberB.16-00107.pdf

221K

---

**benjamin barber** <barberb@barberb.com>

Thu, Mar 24, 2016 at 12:31 AM

To: BOLI - CRD EMAIL <crdemail@boli.state.or.us>, Mike Rogoway <mrogoway@oregonian.com>

Due to the fact that the parties mentioned were in fact advertised to the public these accommodations does not in fact make them private. They are also not selective in their membership except for the the fact that they restrict it to only women. Moreover according to Lahmann v. Grand Aerie of Fraternal Order of Eagles even community service organizations could qualify as business or commercial enterprises for the purposes of public accommodations statutes.

However here is a different complaint, Regarding offering employment recruiting only to women. The fact of the matter is that the event was in fact advertised to the public, but i do understand that you're a politically motivated agency, rather than an agency dedicated to civil rights. So I wonder how you will tolerate an employment recruiting company that provides its service to the public on the basis of gender.

I would also like to have you address the gender discrimination being sponsored and subsidized by the Portland Development Commission, both in the previous case where it provided tax subsidies to land rover jaguar that I mentioned previously. Also in this case the intent was clear: "an end-to-end solution that gives women the training to get hired at a tech company".

[Quoted text hidden]

---

 **Boli Complaint.pdf**  
4323K

---

**benjamin barber** <barberb@barberb.com>

Tue, Mar 29, 2016 at 10:34 AM

To: BOLI - CRD EMAIL <crdemail@boli.state.or.us>

I dont think I got a copy of the report that I'm supposed to sign, would you please send it to me?

[Quoted text hidden]

---

**BOLI - CRD EMAIL** <crdemail@boli.state.or.us>

Tue, Mar 29, 2016 at 11:34 AM

To: benjamin barber <barberb@barberb.com>

Mr. Barber,

The formal complaint for you to get signed and notarized was sent out in today's mail. You should be receiving it within the next couple days.

Thank you,



**Bureau of Labor and Industries**

## Civil Rights Division

800 NE Oregon St #1045

Portland, Oregon 97232

Tel: 971-673-0764

Fax: 971-673-0765

***Nothing in this communication is intended as legal advice. Any responses to specific questions are based on the facts as we understand them and are not intended to apply to any other situation. Neither can we make business decisions for you. If you need legal advice, please contact an attorney. The Oregon State Bar has an attorney referral service, which can be reached at 503-684-3763 or toll-free in Oregon at 800-452-7636.***

**From:** benjamin barber [mailto:[barberb@barberb.com](mailto:barberb@barberb.com)]

**Sent:** Tuesday, March 29, 2016 10:34 AM

**To:** BOLI - CRD EMAIL

**Subject:** Re: BOLI Civil Rights questionnaire

[Quoted text hidden]

---

**benjamin barber** <[barberb@barberb.com](mailto:barberb@barberb.com)>  
To: BOLI - CRD EMAIL <[crdemail@boli.state.or.us](mailto:crdemail@boli.state.or.us)>

Tue, Mar 29, 2016 at 12:47 PM

I'm kind of doing the homeless thing at the moment, I can e-sign it but the address I use is of a relative.

[Quoted text hidden]

---

**BOLI - CRD EMAIL** <[crdemail@boli.state.or.us](mailto:crdemail@boli.state.or.us)>  
To: benjamin barber <[barberb@barberb.com](mailto:barberb@barberb.com)>

Tue, Mar 29, 2016 at 1:38 PM

Mr. Barber,

The formal complaint has to be notarized so the hard copy that comes to your relatives address (assuming that is the address on Water Avenue where it was sent) may be the easiest option. Once you receive that you will have to sign it in front of a notary. If we email you a copy through email it would still need to be notarized which



would likely you mean you would need to print it out in order to get the document notarized. Let us know if you would like to it emailed to you.

Our offices do offer free notarization services if you prefer to come in to our office instead of finding a notary on your own. You can also come in and pick up a copy of your complaint if you are concerned about getting it from the address you provided we also have a copy.

Our offices is open Monday through Friday 8 to 5pm.. and if you bring in the complaint yourself you can come by anytime. If you choose to come in to pick up your complaint and/or notarize and return it.. just email us to let us know when you plan on coming in so a copy can be brought to reception before you arrive. Just let us know what is easiest for you...

Thank you,



## **Bureau of Labor and Industries**

### **Civil Rights Division**

800 NE Oregon St #1045

Portland, Oregon 97232

Tel: 971-673-0764

Fax: 971-673-0765

***Nothing in this communication is intended as legal advice. Any responses to specific questions are based on the facts as we understand them and are not intended to apply to any other situation. Neither can we make business decisions for you. If you need legal advice, please contact an attorney. The Oregon State Bar has an attorney referral service, which can be reached at 503-684-3763 or toll-free in Oregon at 800-452-7636.***

**From:** benjamin barber [mailto:[barberb@barberb.com](mailto:barberb@barberb.com)]  
**Sent:** Tuesday, March 29, 2016 12:47 PM

[Quoted text hidden]

[Quoted text hidden]

---

**benjamin barber** <[barberb@barberb.com](mailto:barberb@barberb.com)>  
To: BOLI - CRD EMAIL <[crdemail@boli.state.or.us](mailto:crdemail@boli.state.or.us)>

Thu, Apr 7, 2016 at 11:26 AM

Would you please send me the form via email?  
[Quoted text hidden]

---

**BOLI - CRD EMAIL** <[crdemail@boli.state.or.us](mailto:crdemail@boli.state.or.us)>  
To: benjamin barber <[barberb@barberb.com](mailto:barberb@barberb.com)>

Thu, Apr 7, 2016 at 12:33 PM

Attached is your complaint that needs to be notarized and a release of information form.

Thank you,



## **Bureau of Labor and Industries**

### **Civil Rights Division**

800 NE Oregon St #1045

Portland, Oregon 97232

Tel: [971-673-0764](tel:971-673-0764)

Fax: [971-673-0765](tel:971-673-0765)

***Nothing in this communication is intended as legal advice. Any responses to specific questions are based on the facts as we understand them and are not intended to apply to any other situation. Neither can we make business decisions for you. If you need legal advice, please contact an attorney. The Oregon State Bar has an attorney referral service, which can be reached at [503-684-3763](tel:503-684-3763) or toll-free in Oregon at [800-452-7636](tel:800-452-7636).***

**From:** benjamin barber [mailto:[barberb@barberb.com](mailto:barberb@barberb.com)]  
**Sent:** Thursday, April 07, 2016 11:26 AM

[Quoted text hidden]

[Quoted text hidden]

---

**2 attachments**



**BBarberCHG.pdf**  
389K



**Release of Information 1.29.14.pdf**  
10K

---

**BOLI - CRD EMAIL** <[crdemail@boli.state.or.us](mailto:crdemail@boli.state.or.us)>  
To: benjamin barber <[barberb@barberb.com](mailto:barberb@barberb.com)>

Wed, Apr 20, 2016 at 11:10 AM

Mr. Barber,

We know that you were already emailed your complaint and release of information so you have the necessary documents needed for you to proceed.. But we wanted to notify you that the original complaint that was sent to the address of family member you provided - 2637 SW Water Avenue, Portland, OR 97201- came back as return to sender.

If/when you have a another mailing address that you would like us to have on file let us know. FYI: We can use 'General Delivery' addresses that you would just pick up at a certain post office as the mailing address and do not need an actual physical address if that helps at all.

Also, let us know if you would like to choose to get the complaint notarized and returned to us by coming into our Portland office (address below, we are near the Lloyd center).

Thank you,



**Bureau of Labor and Industries**

**Civil Rights Division**

800 NE Oregon St #1045

Portland, Oregon 97232

Tel: 971-673-0764

Fax: 971-673-0765

***Nothing in this communication is intended as legal advice. Any responses to specific questions are based on the facts as we understand them and are not intended to apply to any other situation. Neither can we make business decisions for you. If you need legal advice, please contact an attorney. The Oregon State Bar has an attorney referral service, which can be reached at 503-684-3763 or toll-free in Oregon at 800-452-7636.***

---

**benjamin barber** <barberb@barberb.com>  
To: BOLI - CRD EMAIL <crdemail@boli.state.or.us>

Thu, May 19, 2016 at 10:15 PM

I was wondering if you got the signed and notarized complaint form in the mail.  
[Quoted text hidden]

---

**BOLI - CRD EMAIL** <crdemail@boli.state.or.us>  
To: benjamin barber <barberb@barberb.com>

Fri, May 20, 2016 at 10:29 AM

Hello:

Your notarized complaint was received on May 12, 2016. Your case has been assigned to Investigator: Brittney Boggs. You can reach her at 971-673-0745.

Thanks,

BOLI/CRD

16-00107

**From:** benjamin barber [mailto:[barberb@barberb.com](mailto:barberb@barberb.com)]



**Sent:** Thursday, May 19, 2016 10:16 PM

**To:** BOLI - CRD EMAIL

**Subject:** Re: BOLI Civil Rights questionnaire

I was wondering if you got the signed and notarized complaint form in the mail.

[Quoted text hidden]



benjamin barber <starworks5@gmail.com>

---

**caase #STPASX160512-10651**

13 messages

---

**Boggs, Brittney** <brittney.boggs@state.or.us>  
To: "barberb@barberb.com" <barberb@barberb.com>

Fri, May 27, 2016 at 2:46 PM

Mr. Barber-

As discussed via our phone conversation, the copy of your complaint that was sent out by our department was returned to sender. I have scanned a copy of the document which was originally sent and attached it to this email per your request . Would you please confirm that you have received it for my records.

Best Regards,

Brittney Boggs

Civil Rights Division



800 NE Oregon St. Suite 1045

Portland OR 97232-2180

(971)673-0745



**201605271433.pdf**  
805K

---

**benjamin barber** <barberb@barberb.com>  
To: "Boggs, Brittney" <brittney.boggs@state.or.us>

Fri, May 27, 2016 at 7:32 PM

I have received this.  
[Quoted text hidden]

---

**benjamin barber** <barberb@barberb.com>

Fri, May 27, 2016 at 9:37 PM

To: "Boggs, Brittney" <brittney.boggs@state.or.us>

<http://archive.is/e0jQ3>

<https://www.youtube.com/watch?v=6TtuyishzCU>

"ScoutSavvy is a new startup company in the Portland, OR area and is designed exclusively with women looking to re-enter the workforce. Check out their website at ScoutSavvy.co"

<http://archive.is/oTy6f>

<http://www.bizjournals.com/portland/blog/techflash/2016/02/new-portland-jobs-board-pairs-women-with-tech-jobs.html>

"My grand vision is to create an end-to-end solution that gives women the training to get hired at a tech company that values gender diversity," Brown said."

<http://archive.is/lal9w>

<http://katu.com/news/local/new-website-helps-women-enter-the-tech-field>

"It's a site where hiring managers can come to recruit women who are the most talented technical women in the city of Portland,"

<http://archive.is/scoutsavvy.co>

archive links of the website.

[Quoted text hidden]

---

**benjamin barber** <barberb@barberb.com>

Mon, Jun 13, 2016 at 2:16 AM

To: "Boggs, Brittney" <brittney.boggs@state.or.us>

I havent heard from your office in a while, what is the status of that interview that I needed to do.

[Quoted text hidden]

---

**Boggs, Brittney** <brittney.boggs@state.or.us>

Mon, Jun 13, 2016 at 7:48 AM

To: benjamin barber <barberb@barberb.com>

Mr. Barber,

I am still waiting for the Respondent's Position Statement. They have until the end of the day on Friday June 17, 2016 to get it to me. I will be reviewing it, formulating my questions, and setting up a time for the interview the following week. Usually I wait until I have the position statement in hand before scheduling the interview which is why you have not heard from me. However, given it is due in just a few days, If you would like to schedule that interview now, we can do so. I would be able to conduct a phone interview Thursday -June 23, Friday- June 24, Monday- June 27, or Tuesday- June 28, between the hours of 7:30 am and 2:00 PM. If there is a day and time you, we can go ahead and schedule the interview now. Generally the interviews last

between 1 and 2 hours.

-Brittney Boggs

Civil Rights Division



800 NE Oregon St. Suite 1045

Portland OR 97232-2180

(971)673-0745

**From:** benjamin barber [mailto:[barberb@barberb.com](mailto:barberb@barberb.com)]  
**Sent:** Monday, June 13, 2016 2:17 AM  
**To:** Boggs, Brittney  
**Subject:** Re: caase #STPASX160512-10651

[Quoted text hidden]

---

**benjamin barber** <[barberb@barberb.com](mailto:barberb@barberb.com)>  
To: "Boggs, Brittney" <[brittney.boggs@state.or.us](mailto:brittney.boggs@state.or.us)>

Mon, Jun 27, 2016 at 8:18 AM

can I have an interview tomorrow morning / afternoon?  
[Quoted text hidden]

---

**Boggs, Brittney** <[brittney.boggs@state.or.us](mailto:brittney.boggs@state.or.us)>  
To: benjamin barber <[barberb@barberb.com](mailto:barberb@barberb.com)>

Mon, Jun 27, 2016 at 8:21 AM

Mr. Barber,

I have Interviews already scheduled for the next two days. The soonest I would be available either on Thursday June 30<sup>th</sup>, or Friday July 1<sup>st</sup>. I can schedule them any time between 8 am and 2:00 on those days.

Brittney Boggs

Civil Rights Division



800 NE Oregon St. Suite 1045

Portland OR 97232-2180

(971)673-0745

**From:** benjamin barber [mailto:[barberb@barberb.com](mailto:barberb@barberb.com)]

**Sent:** Monday, June 27, 2016 8:19 AM

[Quoted text hidden]

[Quoted text hidden]

---

**benjamin barber** <[barberb@barberb.com](mailto:barberb@barberb.com)>  
To: "Boggs, Brittney" <[brittney.boggs@state.or.us](mailto:brittney.boggs@state.or.us)>

Mon, Jun 27, 2016 at 10:24 AM

okay, just choose one of those days.

[Quoted text hidden]

---

**Boggs, Brittney** <[brittney.boggs@state.or.us](mailto:brittney.boggs@state.or.us)>  
To: benjamin barber <[barberb@barberb.com](mailto:barberb@barberb.com)>

Mon, Jun 27, 2016 at 10:47 AM

Mr. Barber,

How does Thursday June 30<sup>th</sup>, 2016 at 9:30 am sound? Generally these interviews take between one and two hours. Please have any witness information with you. It is a telephone interview, I have a cell Phone Number [971-270-0855](tel:971-270-0855). Is this still your current number?

Thank you,

Brittney Boggs

Civil Rights Division



800 NE Oregon St. Suite 1045

Portland OR 97232-2180



(971)673-0745

**From:** benjamin barber [mailto:[barberb@barberb.com](mailto:barberb@barberb.com)]

**Sent:** Monday, June 27, 2016 10:25 AM

[Quoted text hidden]

[Quoted text hidden]

---

**benjamin barber** <[barberb@barberb.com](mailto:barberb@barberb.com)>  
To: "Boggs, Brittney" <[brittney.boggs@state.or.us](mailto:brittney.boggs@state.or.us)>

Mon, Jun 27, 2016 at 10:56 AM

that sounds fine.

[Quoted text hidden]

---

**Boggs, Brittney** <[brittney.boggs@state.or.us](mailto:brittney.boggs@state.or.us)>  
To: benjamin barber <[barberb@barberb.com](mailto:barberb@barberb.com)>

Mon, Jun 27, 2016 at 10:57 AM

Mr. Barber,

We are confirmed for Thursday June 30<sup>th</sup>, at 9:30 am.

Brittney Boggs

Civil Rights Division



800 NE Oregon St. Suite 1045

Portland OR 97232-2180

(971)673-0745

**From:** benjamin barber [mailto:[barberb@barberb.com](mailto:barberb@barberb.com)]

**Sent:** Monday, June 27, 2016 10:57 AM

[Quoted text hidden]

[Quoted text hidden]

---

**benjamin barber** <[barberb@barberb.com](mailto:barberb@barberb.com)>

Thu, Jun 30, 2016 at 9:43 PM

To: "Boggs, Brittney" <brittney.boggs@state.or.us>

<http://scoutsavvy.co/>

"More than a job board. More than just women. "

"As it turns out, limiting our valuable platform to just part of a vast and vibrant community limits our potential to create a diverse workforce, rather than expanding it. "

There you go, full admission, on the home page.

<https://drive.google.com/file/d/1XJ8sXY0bBysyHwPKGvk2Zr5xDrx7ti8nnPWxo2fY3WdA0u1Hv54QQ07G9OFkUACVTD-2UKW9AH5ojWyb/view?usp=sharing>  
[https://drive.google.com/file/d/1y7uqJmnS8bfdgA3ULijrxDb8dGmx8qpxEsZulHIWHuf7vU7f\\_Q8fXzJCQ6TpGc\\_pjuaZ-TVz\\_rm6USZv/view?usp=sharing](https://drive.google.com/file/d/1y7uqJmnS8bfdgA3ULijrxDb8dGmx8qpxEsZulHIWHuf7vU7f_Q8fXzJCQ6TpGc_pjuaZ-TVz_rm6USZv/view?usp=sharing)

"my account" link

[https://drive.google.com/file/d/1Wm2VgS7SVgC6vMnMD13YatXp1tK5t0zczm0AkjlfMDCTFq-\\_N576m3uoz5ZCdtgaEWR6NBsB5-AYyRsz/view?usp=sharing](https://drive.google.com/file/d/1Wm2VgS7SVgC6vMnMD13YatXp1tK5t0zczm0AkjlfMDCTFq-_N576m3uoz5ZCdtgaEWR6NBsB5-AYyRsz/view?usp=sharing)

<http://katu.com/news/local/new-website-helps-women-enter-the-tech-field>

"It's a site where hiring managers can come to recruit women who are the most talented technical women in the city of Portland," Brown said."

(implying that anyone who uses it has intent to discriminate)

"Right now what I'm hearing hiring managers say is, 'OK I have an open position, but for every position I have, I have 20 guys apply and I have one woman. I really don't have time to go out and recruit women.'"

*It is not overcome when other personal characteristics or social roles are assigned to men or women because of their gender and for no other reason.* "-- hewitt vs saif Or supreme court

<http://webcache.googleusercontent.com/search?q=cache:nSGs1b1VGDgJ:www.bizjournals.com/portland/blog/techflash/2016/02/new-portland-jobs-board-pairs-women-with-tech-jobs.html+&cd=1&hl=en&ct=clnk&gl=us>

"Her aim? Make it the go-to place for Portland area tech firms to find talented technical employees who happen to be female."

"The inspiration for the model was a conversation with hiring managers that are looking for more women in the hiring pipeline but they get one female resume for every 20 guys. "

(implying intent to discriminate)

"To get the business off the ground, Brown is starting by targeting the two dozen Portland companies that have signed on to the Portland Diversity Pledge as well as organizations such as Women Who Code Portland and PDX Women in Tech."

ORS 659A.030<sup>1</sup> expresses directly or indirectly any limitation, specification or discrimination

Note: This is the pledge which accompanied tax breaks from the Portland Development Commission.

<http://www.techtownportland.com/steps-taken>

"Brought to you by the Portland Development Commission"

<http://developmentnow.com/2015/07/08/3-things-companies-can-do-right-now-to-improve-diversity-in-tech-an-interview-with-jared-wiener-of-the-portland-development-commission/>

(interview with the software development liason from the portland development commission by Kathryn Brown)

<http://marker.to/5saHQn>

(highlighted with emphassis)

Here is the small claims court case that I won for for discrimination on the basis of gender in a "private club" kicking out men, the case which you would not prosecute because you were not versed in the case law.

<https://docs.google.com/document/d/1mihDVcFKZK-nQtNzpzdsFNbPMz6XZkHsDNygna9YXVU/edit?usp=sharing>

This should provide you with the legal basis to perform more regulatory oversight of the PDC and other similar organizations in Portland. A race / gender neutral (like "free geek") method of poverty alleviation is sufficient, not particular government funded benefits in terms of training, grants, and employment benefits, which are based on suspect classes.

This fails the strict scrutiny test which was passed by the voters as an amendment to the oregon constitution in addition to a supreme court decision

SECTION 46. (1) Equality of rights under the law shall not be denied or abridged by the State of Oregon or by any political subdivision in this state on account of sex.

(2) The Legislative Assembly shall have the power to enforce, by appropriate legislation, the provisions of this section.

(3) Nothing in this section shall diminish a right otherwise available to persons under section 20 of this Article or any other provision of this Constitution.[2]

In the case of the claims of the defendant that its organization meets the unique needs of women, In the Oregon Supreme Court Case of Hewett v. Saif, regarding state sponsored discrimination against men, the chief justice Betty Roberts decided for the majority, establishing a defacto equal rights law at the time.

*Gender is a visible characteristic determined by causes not within the control of the individual. It bears no relation to ability to contribute to or participate in society. The purposeful historical, legal, economic and political unequal treatment of women is well known. Accordingly, we hold that when classifications are made on the basis of gender, \*978 they are, like racial, alienage and nationality,*

*classifications, inherently suspect. The suspicion may be overcome if the reason for the classification reflects specific biological differences between men and women. It is not overcome when other personal characteristics or social roles are assigned to men or women because of their gender and for no other reason. That is exactly the kind of stereotyping which renders the classification suspect in the first place.*

§ 30.860<sup>1</sup>

Action for trade discrimination

(1) A person or governmental entity may not discriminate against, boycott, blacklist or refuse to buy from, sell to or trade with any person because of foreign government imposed or sanctioned discrimination based upon the race, religion, sex, sexual orientation or national origin of the person or of the persons partners, members, directors, stockholders, agents, employees, business associates, suppliers or customers.

(2) Any person directly injured in business or property by a violation of subsection (1) of this section may sue whoever knowingly practices, or conspires to practice, activities prohibited by subsection

(1) of this section, and shall recover threefold the damages sustained. The court shall award reasonable attorney fees to the prevailing plaintiff in an action under this section. The court may award reasonable attorney fees and expert witness fees incurred by a defendant who prevails in the action if the court determines that the plaintiff had no objectively reasonable basis for asserting a claim or no objectively reasonable basis for appealing an adverse decision of a trial court. [1977 c.395 §§1,2; 1981 c.897 §9; 1995 c.618 §28; 2007 c.100 §15]

659A.030<sup>1</sup>

Discrimination because of race, color, religion, sex, sexual orientation, national origin, marital status or age prohibited

(1) It is an unlawful employment practice:

(a) For an employer, because of an individual's race, color, religion, sex, sexual orientation, national origin, marital status or age if the individual is 18 years of age or older, or because of the race, color, religion, sex, sexual orientation, national origin, marital status or age of any other person with whom the individual associates, or because of an individual's juvenile record that has been expunged pursuant to ORS 419A.260 (Expunction) and 419A.262 (Expunction proceeding), to refuse to hire or employ the individual or to bar or discharge the individual from employment. However, discrimination is not an unlawful employment practice if the discrimination results from a bona fide occupational qualification reasonably necessary to the normal operation of the employer's business.

(b) For an employer, because of an individual's race, color, religion, sex, sexual orientation, national origin, marital status or age if the individual is 18 years of age or older, or because of the race, color, religion, sex, sexual orientation, national origin, marital status or age of any other person with whom the individual associates, or because of an individual's juvenile record that has been expunged pursuant to ORS 419A.260 (Expunction) and 419A.262 (Expunction proceeding), to discriminate against the individual in compensation or in terms, conditions or privileges of employment.

(c) For a labor organization, because of an individual's race, color, religion, sex, sexual orientation, national origin, marital status or age if the individual is 18 years of age or older, or because of an individual's juvenile record that has been expunged pursuant to ORS 419A.260 (Expunction) and 419A.262 (Expunction proceeding), to exclude or to expel from its membership the individual or to discriminate in any way against

the individual or any other person.

(d)For any employer or employment agency to print or circulate or cause to be printed or circulated any statement, advertisement or publication, or to use any form of application for employment or to make any inquiry in connection with prospective employment that expresses directly or indirectly any limitation, specification or discrimination as to an individuals race, color, religion, sex, sexual orientation, national origin, marital status or age if the individual is 18 years of age or older, or on the basis of an expunged juvenile record, or any intent to make any such limitation, specification or discrimination, unless based upon a bona fide occupational qualification. Identification of prospective employees according to race, color, religion, sex, sexual orientation, national origin, marital status or age does not violate this section unless the Commissioner of the Bureau of Labor and Industries, after a hearing conducted pursuant to ORS 659A.805 (Rules for carrying out ORS chapter 659A), determines that the designation expresses an intent to limit, specify or discriminate on the basis of race, color, religion, sex, sexual orientation, national origin, marital status or age.

(e)For an employment agency, because of an individuals race, color, religion, sex, sexual orientation, national origin, marital status or age if the individual is 18 years of age or older, or because of the race, color, religion, sex, sexual orientation, national origin, marital status or age of any other person with whom the individual associates, or because of an individuals juvenile record that has been expunged pursuant to ORS419A.260 (Expunction) and 419A.262 (Expunction proceeding), to classify or refer for employment, or to fail or refuse to refer for employment, or otherwise to discriminate against the individual. However, it is not an unlawful employment practice for an employment agency to classify or refer for employment an individual when the classification or referral results from a bona fide occupational qualification reasonably necessary to the normal operation of the employers business.

(f)For any person to discharge, expel or otherwise discriminate against any other person because that other person has opposed any unlawful practice, or because that other person has filed a complaint, testified or assisted in any proceeding under this chapter or has attempted to do so.

(g)For any person, whether an employer or an employee, to aid, abet, incite, compel or coerce the doing of any of the acts forbidden under this chapter or to attempt to do so.

(2)The provisions of this section apply to an apprentice under ORS660.002 (Declaration of policy) to 660.210 (Tort liability of committees, officers, employees and agents), but the selection of an apprentice on the basis of the ability to complete the required apprenticeship training before attaining the age of 70 years is not an unlawful employment practice. The commissioner shall administer this section with respect to apprentices under ORS 660.002 (Declaration of policy) to 660.210 (Tort liability of committees, officers, employees and agents) equally with regard to all employees and labor organizations.

(3)The compulsory retirement of employees required by law at any age is not an unlawful employment practice if lawful under federal law.

(4)(a) It is not an unlawful employment practice for an employer or labor organization to provide or make financial provision for child care services of a custodial or other nature to its employees or members who are responsible for a minor child.

(b)As used in this subsection, responsible for a minor child means having custody or legal guardianship of a minor child or acting in loco parentis to the child.

(5)This section does not prohibit an employer from enforcing an otherwise valid dress code or policy, as long as the employer provides, on a case-by-case basis, for reasonable accommodation of an individual based on the health and safety needs of the individual. [Formerly 659.030; 2007 c.100 §4]

[Quoted text hidden]



**benjamin barber** <barberb@barberb.com>  
To: "Boggs, Brittney" <brittney.boggs@state.or.us>

Mon, Oct 17, 2016 at 12:05 AM

I never got any response as to a resolution with this matter.  
[Quoted text hidden]

**PORTLAND DEVELOPMENT COMMISSION**  
Portland, Oregon

**RESOLUTION NO. 6988**

**ADOPTING THE EQUITY POLICY OF THE PORTLAND DEVELOPMENT  
COMMISSION**

**WHEREAS**, the Portland Development Commission ("PDC") is committed to ensuring that PDC's strategic goals, outcomes, programs, and initiatives advance social and economic equity;

**WHEREAS**, PDC is committed to increasing economic opportunity and income for all Portland residents and historically disadvantaged Portlanders in particular;

**WHEREAS**, PDC is committed to making use of all of PDC's revitalization and economic development activities to create equitable access to living wage jobs and wealth creation opportunities for Portlanders;

**WHEREAS**, PDC will demonstrate its commitment to and leadership in social equity through internal business practices, robust community partnerships, and accountability measures;

**WHEREAS**, the Equity Policy expands the scope and reach of PDC's equity efforts from construction activities under the Business and Workforce Equity Policy (PDC Resolution No. 6561, as amended by PDC Resolution No. 6667, as amended by PDC Resolution No. 6787) to significant projects, community benefit agreements, all PDC investments and resources, and internal business practices including recruitment and retention; and

**WHEREAS**, the Equity Policy reflects the recommendations received from the PDC stakeholder committee on the 2012 PDC Disparity Study.

**NOW, THEREFORE, BE IT RESOLVED** that PDC Resolution No. 6561, as amended by PDC Resolution No. 6667, as amended by PDC Resolution No. 6787, are hereby rescinded;

**BE IT RESOLVED** that the Board adopts the Equity Policy in the form attached hereto as Exhibit A;

**BE IT FURTHER RESOLVED** that the Executive Director is hereby authorized to create procedures necessary to implement the Equity Policy; and

**BE IT FURTHER RESOLVED**, that this resolution shall become effective 30 days after its adoption.

**Adopted by Portland Development Commission on January 9, 2013**



**PORTLAND DEVELOPMENT COMMISSION**  
Portland, Oregon

**RESOLUTION NO. 6988**

**EXHIBIT A**

**ADOPTING OF THE EQUITY POLICY OF THE PORTLAND DEVELOPMENT  
COMMISSION**

Exhibit A – C includes this cover page and contains 5 pages:

- PDC Equity Policy

**PDC Equity Policy  
January 9, 2013**

***PDC's mission is to create one of the world's most desirable and equitable cities by investing in job creation, innovation and economic opportunity throughout Portland.***

**1. OBJECTIVES OF THE PDC EQUITY POLICY**

The objective of the PDC Equity Policy (this "Equity Policy" or "this policy") is to ensure that PDC's strategic goals, outcomes, programs, and initiatives advance social and economic equity by:

- A. Increasing economic opportunity and income for all Portland residents and historically disadvantaged Portlanders (i.e., communities of color and people in priority neighborhoods);
- B. Making use of all of PDC's revitalization and economic development activities to create equitable access to living wage jobs and wealth creation opportunities for Portlanders; and
- C. Demonstrating PDC's commitment to and leadership in social equity through internal business practices, robust community partnerships, and accountability measures.

**2. ORGANIZATIONAL SCOPE**

The Equity Policy is a PDC-wide policy.

**3. DEFINITIONS**

For purposes of this policy, unless otherwise stated, the following definitions shall apply:

*Equity:* Equity is when everyone has access to opportunities necessary to satisfy essential needs, advance their well-being, and achieve their full potential<sup>1</sup>.

*Priority*

*Neighborhoods:* Geographic areas that are either: 1) Experiencing lagging commercial investment and increased or persistent poverty; or 2) Experiencing gentrification pressures.

---

<sup>1</sup> As defined in the Portland Plan.

*Communities*

*of Color:* People who self-identify as Black Americans, Hispanic Americans, Native Americans, Asian-Pacific Americans, Subcontinent Asian-Pacific Americans, and/or first-generation immigrant populations for the purpose of minority business ownership<sup>2</sup>.

Capitalized terms used in this policy without definition have the meaning ascribed to such terms in the Administrative Procedures (as hereinafter defined) to this policy.

#### **4. POLICY CONTENT AND GUIDELINES**

##### **4.1 OVERVIEW**

The Equity Policy objectives are pursued in three primary ways:

- A. Manage all investments, projects and programs in a manner which explicitly considers beneficiaries, addresses disparities, and supports equitable outcomes as further described in Section 4.2 of this policy and the Administrative Procedures;
- B. Ensure that significant PDC investments provide opportunities for living-wage construction jobs, career advancement, and business opportunities for historically disadvantaged populations as further described in Section 4.3 of this policy;
- C. Ensure that PDC's internal business practices increase diversity and social equity within PDC and support partnership, transparency, and accountability with community stakeholders as further described in Section 4.4 of this policy.

##### **4.2 SUPPORTING EQUITABLE OUTCOMES WITH PDC INVESTMENTS, PROJECTS, AND PROGRAMS**

*Description:* PDC activities that impact the community (e.g., real estate projects, community and economic development programs, lending and grant policies, budgetary/investment prioritization, and the processes that govern such decisions and investments) will be evaluated from an equity perspective to (1) answer "who benefits?," (2) ensure that existing disparities are explicitly addressed, and (3) mitigate unintended negative consequences.

- 1. *Practices:* The following practices will inform PDC investments, projects, and programs not addressed under section 4.3:
  - a) **Equity Lens for loans and grants.** A designated tool (the "Equity Lens") shall be used to evaluate all PDC loans and grants to ensure financial resources address

---

<sup>2</sup> As defined by the Coalition of Communities of Color.



disparities, advance strategic equity objectives, and do not result in unintended consequences.

- b) **Equity plan for non-financial investments (i.e., not loans and grants).** Each program, major activity or initiative, non-loan/grant investment, the recipients thereof, and the processes that govern such activities shall address disparities in access or outcomes and reduce unintended consequences such as displacement within the scope of the activity.
- c) **Public accountability.** Analyze and monitor PDC financial and non-financial investments to assess where PDC dollars are going, measure progress against stated social and geographic equity goals, and take corrective action if necessary.

#### **4.3 ENSURING THAT SIGNIFICANT PDC INVESTMENTS PROMOTE OPPORTUNITY OBJECTIVES**

*Description:* When making sizable investments, PDC aims to (1) ensure fair and equitable opportunities for Portland's diverse populations, (2) promote prosperity in all segments of Portland's diverse communities, (3) foster economic growth, and (4) expand competition in the market through explicit agreements with developers and contractors benefiting from the public investment.

*Practices:* The following practices will inform PDC investments designated as "significant":

- a) **The Business Equity Program.** PDC will ensure that its work provides professional, supplier, and construction contracting opportunities to small businesses that have been historically underutilized, including minority-owned ("MBE"), women-owned ("WBE"), and emerging small businesses ("ESB") as certified by the State of Oregon Office of Minority, Women, and Emerging Small Business, as well as Disadvantaged Business Enterprises ("DBE") certified by the U.S. Department of Transportation (collectively, "Certified Firms"), and encourages the participation of businesses owned by veterans on Direct Contracting, Land Transactions, and work utilizing PDC resources, including Interagency and Intergovernmental Agreements.
- b) **The Workforce Equity Program.** PDC will seek to maximize apprenticeship opportunities in the construction trades, promote employment opportunities for Communities of Color and Women, and encourage the employment of people with disabilities and veterans on Direct Contracting, Land Transactions, and on work utilizing PDC resources.
- c) **Community benefits agreements.** Projects receiving "significant" investments through PDC will be evaluated for community benefits in addition to those related to the project's pre-development and construction work. Projects with opportunities for additional community benefits shall be encouraged or required, depending on the specific project, to enter into a community benefits agreement to provide benefits such

as access for local residents to long-term employment opportunities, supply-chain opportunities for local businesses, and publicly-accessible amenities.

#### **4.4 SUPPORTING COMMUNITY PARTNERSHIPS AND INCREASING DIVERSITY AND TRANSPARENCY THROUGH INTERNAL BUSINESS PRACTICES**

*Description:* PDC's internal business practices (e.g., human relations, public affairs, community engagement) will strengthen the diversity and cultural competence of its staff, achieve meaningful public involvement for historically disadvantaged populations, and provide economic opportunity to businesses of color.

*Practices:* The following practices will inform internal PDC processes:

- a) **Human Resources Equity Plan.** PDC will research and document benchmarks and best practices of similar organizations with successful internal/staff-focused diversity and equity programs. The Human Resources division will subsequently develop, adopt and implement a plan to retain, promote, and recruit a diverse staff reflective of the local community.
- b) **Community engagement.** PDC shall engage the community in ways that allow for meaningful public involvement of those impacted by projects, programs, and processes. Advisory groups shall reflect the communities affected by PDC activities. Multicultural and multilingual considerations and translations shall be consistently made available. PDC will work closely with all communities, particularly those that have been historically disadvantaged, to explicitly address structural disparities, create pathways to prosperity, and determine the process for community involvement and governance.
- c) **Accountability and Governance.** Cultural competency and inclusionary practices that support the PDC Strategic Plan and annual work plans will be integrated into employees' mid-year and annual performance evaluations.
- d) **PDC Equity Council** (or other body designated by the Executive Director) will serve as an internal advisory group to monitor organizational progress, make recommendations for improving diversity and cultural competency, and provide training and other assistance, as necessary, to promote progress toward policy objectives.

#### **5. IMPLEMENTATION**

The Executive Director is hereby authorized to create and periodically update administrative policies or procedures to guide implementation of this policy (the "Administrative Procedures").

**RESOLUTION NO. 6988****RESOLUTION TITLE:**

ADOPTING THE EQUITY POLICY OF THE PORTLAND DEVELOPMENT COMMISSION

Adopted by the Portland Development Commission on January 9, 2013

PRESENT FOR VOTE	COMMISSIONERS	VOTE		
		Yea	Nay	Abstain
<input checked="" type="checkbox"/>	Chair Scott Andrews	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Commissioner Aneshka Dickson	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Commissioner John Mohlis	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Commissioner Steven Straus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Commissioner Charles Wilhoite	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Consent Agenda <input checked="" type="checkbox"/> Regular Agenda				

**CERTIFICATION****The undersigned hereby certifies that:**

*The attached resolution is a true and correct copy of the resolution as finally adopted at a Board Meeting of the Portland Development Commission and as duly recorded in the official minutes of the meeting.*

	<b>Date:</b>
	January 24, 2013
Gina Wiedrick, Recording Secretary	

archive.is  
webpage capture

Saved from <http://calagator.org/>

search

25 Jan 2015 23:41:46 UTC

 [history](#) [←prior](#) [next→](#)

All snapshots from host [calagator.org](http://calagator.org)

Linked from [meta.wikimedia.org](http://meta.wikimedia.org) » [Talk:Reports](#)  
[en.wikipedia.org](http://en.wikipedia.org) » [Portland Linux/Unix Group](#)

Webpage

Screenshot

 [share](#) [download .zip](#) [report error or abuse](#)

# Calagator

Events Venues

Search Events

Get Involved: [Blog](#) | [Forum](#) | [Code](#)

Something not right? [File an issue](#)

[Browse Events](#) [Add an event](#) [Import event\(s\)](#)

## Hi there.

**Calagator** is a unified calendar for the technology community of Portland, Oregon. We are an all-volunteer effort and encourage anyone to import, create, and edit events.

### Get Started

- [Find local events](#)
- [Share local events](#)
- [Get involved](#)
- [Find out about us](#)

### Subscribe To

- [iCalendar feed](#)
- [Atom feed](#)

## Popular tags

[agile](#) · [angel](#) · [art](#) · [beer](#) · [business](#) · [calagator](#) · [cleantech](#) · [cocoa](#) · [code sprint](#) · [collaboration](#) · [community](#) · [conference](#) · [corvallis](#) · [cubespace](#) · [database](#) · [diy](#) · [django](#) · [energy](#) · [entrepreneur](#) · [extreme programming](#) · [finance](#) · [flex](#) · [food](#) · [formal methods](#) · [free](#) · [fun](#) · [functional programming](#) · [funding](#) · [galois](#) · [game](#) · [games](#) · [geography](#) · [gis](#) · [green](#) · [hardware](#) · [haskell](#) · [health](#) · [help](#) · [human resources](#) · [intel](#) · [java](#) · [leadership](#) · [lean](#) · [lecture](#) · [linux](#) · [location](#) · [lunch](#) · [mac](#) · [management](#) · [mapping](#) · [maps](#) · [music](#) · [networking](#) · [nptech](#) · [oem](#) · [open house](#) · [open source](#) · [oscon](#) · [party](#) · [pdxfunc](#) · [pdxphp](#) · [pdxpm](#) · [pdxpug](#) · [perl](#) · [php](#) · [pizza](#) · [plug](#) · [postgres](#) · [postgresql](#) · [programming](#) · [psu](#) · [python](#) · [qa](#) · [ruby](#) · [sao](#) · [science](#) · [scrum](#) · [security](#) · [smalltalk](#) · [social](#) · [social media](#) · [sql](#) · [startup](#) · [startups](#) · [support](#) · [talk](#) · [technology](#) · [training](#) · [ubuntu](#) · [unconference](#) · [user groups](#) · [vc](#) · [wherecampdx](#) · [wine](#) · [wordpress](#) · [workshop](#) · [writer](#) · [writing](#) · [xp](#) · [xpxd](#)

## What's happening?

[View All »](#)

### Today

**Sunday**  
Jan 25 2015  
**Women Who Hack**  
1–5pm  
Mozilla Portland Office

### Tomorrow

**Monday**  
Jan 26 2015  
**[Women only] PDX Women Founders Forum**  
6–9pm  
New Relic  
**Apple Watch, Android Wear and Wearables**  
6pm  
Urban Airship Headquarters  
**Monday Python (Programmer Peer Mentoring Night)**  
6–9pm  
PDX Code Guild  
**Dorkbot**  
7–10pm  
Bunk Bar  
**pdxdevops**  
7–8pm  
Puppet Labs

### Next two weeks

**Tuesday**  
Jan 27 2015  
**PDX Women in Tech Happy Hour Networking Event**  
4:30–6:30pm  
Propeller Resources  
**eBay Tech Tuesday: The Evolution of Culture in Portland Tech**  
6–8pm  
eBay Community Lounge  
**RainSec**  
6:30–9:30pm  
Lucky Labrador Brew Pub  
**Tips and Tricks for App Store Success w/ Chris Beauchamp of Crittercism**  
6:30–8:30pm  
Esri Portland R&D Center  
**[Women only] Code 'n' Splode Monthly Meeting**  
7–8:30pm  
Mozilla  
**Programming OS Web Spatio-temporal Mapping Visualizations**  
7–9pm  
Anna Bananas, St Johns  
**Wednesday**  
Jan 28 2015  
**Scaling for Growth – Planning, Challenges and Resources | Technology Service Event**  
7:30–9:30am  
Multnomah Athletic Club  
**1 Million Cups - Portland Female Founders**

9–10am  
Forge Portland

**Ruby Lunch**  
11:30am–1pm  
Fat Head's Brewery

**Portland 3D Printing Lab January Meetup**  
3–4pm  
New Relic

**Tech on Tap**  
5–7pm  
CorSource

**[Women only] Lesbians Who Tech - OMSI After Dark: Sugar Sweet Science**  
6–9pm  
OMSI (Oregon Museum of Science and Industry)

**PDX Cocoaheads**  
6:30–8:30pm  
Walmart Labs

**PDX Python Presentation Night**  
6:30–8:30pm  
Urban Airship Inc

**PDX Design Research Group**  
6:30–8pm  
Mozilla

**Portland JavaScript Admirers' Monthly Meeting**  
7pm  
Janrain Inc

**Thursday**  
Jan 29 2015

**TiE Oregon Pitch Club featuring Nitin Rai on Startup Cash Flow**  
5:30–8:30pm  
TiE Pearl Incubator

**Circle Up Networking: Ask less, Give more**  
6:30–9pm  
Starve Ups Garage (331 NE Hancock Street, Portland)

**CTRL-H Open House**  
7–9pm  
CTRL-H

**Friday**  
Jan 30 2015

**Ruby Co-Working**  
10:30am–2pm  
Breken Kitchen

**Saturday**  
Jan 31 2015

**Unix & Git for Everyone Workshop**  
9am–5pm  
Portland, Oregon

**Sports Hack Day**  
11am through Sunday, February 1 at 8pm  
DevelopmentNow -

**"Girl Rising" at Intel**  
11am–noon  
Intel Hawthorne Farms Building 3 (HF3), Auditorium

**WIN with ChickTech: Girl Rising STEM Event**  
1–5pm  
Intel Hawthorn Farms 3 (HF3) Campus

**Monday**  
Feb 2 2015

**Portland Puppet User Group February 2nd Meeting**  
6–8pm  
Puppet Labs Office in Block 300 Building: 308 SW 2nd Ave, Floor 5

**Monday Python (Programmer Peer Mentoring Night)**  
6–9pm  
PDX Code Guild

**Tuesday**  
Feb 3 2015

**Code Fellows Portland Open House Warming**  
10–11am  
Code Fellows

**Sailing away from Dependency Hell with Docker: Engineering Lunch-n-Learn w/Quick Left**  
noon–1pm



Quick Left Portland

Deconstructing Women in Technology: What is the data really telling us?

5–6pm  
Quick Left

Drop in hour for prospective students

5:30–6:30pm  
Epicodus



Portland Ruby Brigade monthly meeting

6–10pm  
New Relic



Monthly Maker Meetup

6–9pm  
CymaSpace

Write The Docs PDX: Enabling Walkup Contributions to Your Project Documentation

6–8pm  
eBay Community Lounge

Ninja Sales Techniques

6–8pm  
Portland Community College, CLIMB Center

Demolicious Portland

6–9pm  
Empirical Theater at OMSI

Science on Tap - Cascadia Earthquake

7–9pm  
Clinton Street Theater



Wednesday  
Feb 4 2015

1 Million Cups - Portland Food Founders

9–10am  
Forge Portland

CrowdCompass by Cvent hosts Portland Lunch 2.0

11:30am–1pm  
CrowdCompass by Cvent

Startup Week Is Every Week, And Not Just In Portland

4–6pm  
Ecotrust Billy Frank, Jr. Conference Center

Code Oregon Meetup

5–8pm  
The Gameroom

PDX Startup Week: Where Are Your Wearables Hackfest

6–10pm  
Quick Left

Javascript Study Group and Hack Night (now with more than intro fun!)

6pm  
PDX Code Guild

CHIFOO Meeting: Playing Is The Thing, Interactive Fiction, Gaming, and Improvisation

7–8:30pm  
ISITE Design New Meeting Room!

Thursday  
Feb 5 2015

WIT: Opportunity Knocks! How to Get into Tech Without an Engineering Degree

4–6:30pm  
eBay Community Lounge

WIT: Opportunity Knocks! How to Get into Tech Without an Engineering Degree

4:30–6pm  
eBay Community Lounge

MaptimePDX

6–8pm  
Esri Portland R&D Center



Portland Linux/Unix Group

7–9pm  
PSU Maseeh Engineering Building



PDX Big Data Discussion Group

7–9pm  
New Relic

Friday  
Feb 6 2015

Calagator: Portland's Free Agenda

Coffee w/ Co-Founders X (Portland Startup Week Edition)  
10–11am  
Punch Bowl Social

Coffee w/ Co-Founders X (Portland Startup Week Edition)  
10–11am  
Punch Bowl Social

Ruby Co-Working  
10:30am–2pm  
Breken Kitchen

Little Oregon Laboratory Hackathon  
6pm through Sunday, February 8 at 4pm  
CrowdCompass by Cvent

Saturday  
Feb 7 2015

Unity 5 Roadshow  
9am–6pm  
Portland Marriott (Downtown)

Calagator & Open Source Bridge Code Sprint  
1–5pm  
Epicodus

View future events »

calagator.org

# Changing the Ratio

## WOMEN IN TECH

**Wednesday, December 10**

**4:00 - 5:00pm**

Tech Workshop for girls

**5:00 - 7:00pm**

Networking



1400 SW 5th Ave, 3rd Floor  
Portland, OR 97201

Questions? Contact Lainie Block Wilker [lainie@teamtreehouse.com](mailto:lainie@teamtreehouse.com) or Elizabeth Nye [Elizabeth@girlsincpnw.org](mailto:Elizabeth@girlsincpnw.org)

Join Treehouse, Girls Inc. and ChickTech in partnership with the Clinton Global Initiative, for Changing the Ratio, to inspire more young women to pursue careers in technology, as a matter of economic equity. Treehouse teacher Joy Kesten will lead a tech workshop for Girls Inc. participants, followed by a networking event for women in tech to build a dynamic base of mentors and role models to facilitate internships and career connections.



Women hold less than 25% of high-paying computer-science related positions.



Nationally, women earn just 77% of what their male counterparts earn across all industries.



By 2020, there will be one million more coding jobs than people to fill them, a \$500 billion salary opportunity.



Computing jobs are growing at twice the national average and pay 75% more than the median annual salary.

Join us for a fun mixer to expand career paths for women in the rapidly-growing tech sector.

**RSVP at <http://changingtheratio.eventbrite.com>**



Treehouse provides quality online training in web design, programming, and app design for in-demand tech jobs.



Girls Incorporated  
of the Pacific Northwest

Girls Inc. offers quality STEM programs to help girls to be strong, smart, bold and economically independent.



Providing fun, hands-on opportunities for girls and women to get engaged with technology.



SEP  
17

**Women Only: "My  
Story: A Non-  
Snapchatty  
Conversation with...**

by Portland State University: Lab for  
Interconnected Devices (LID)

Free



Sales Ended

DETAILS

DESCRIPTION

This will be a panel discussion on Women in studying STEM fields. It will be moderated by Janice Levenhagen-Seeley, CEO and Founder of ChickTech Inc. There will be representatives from the STEM fields around PSU. As a note this is a Women Only event.

DATE AND TIME

Sat, September 17, 2016  
12:00 PM – 1:00 PM PDT  
[Add to Calendar](#)

LOCATION

1930 SW 4th Ave  
1930 Southwest 4th Avenue  
EB 103  
Portland, OR 97201  
[View Map](#)

TAGS

Things To Do In Portland, OR

Seminar

Science & Tech

SHARE WITH FRIENDS



FRIENDS WHO ARE GOING

[Connect to Facebook](#)

# Hillsboro Enterprise Zone Program

## Overview

The Hillsboro Enterprise Zone program allows a 100% property tax abatement for eligible businesses on new qualified capital assets (not currently on the tax rolls) within the designated enterprise zone for a three to five year period.

## Eligible Business

Eligible businesses are primarily firms that provide goods, products, or services to businesses or other organizations through, but not limited to, manufacturing, processing, shipping, assembly, and fabrication. In addition, businesses engaged in retail or financial services are eligible if (1) the activity serves customers by responding to orders or requests received only by telephone, computer, the Internet or similar means of telecommunications; and (2) not less than 90 percent of the customers or orders are located and originate in an area from which long distance phone charges would apply if the order were placed by phone.

The business use must meet the current zoning regulations for the property, be within the enterprise zone boundary, and the site must be annexed to the City of Hillsboro.

## Program Requirements

### State of Oregon:

- Increase full time, permanent employment of the firm within the enterprise zone by the greater of one new job (new businesses to Hillsboro) or 10 percent (expansion of existing Hillsboro businesses)
- No concurrent job losses more than 30 miles from the zone.
- Maintain employment levels during exemption period.
- Do not retire, sell, or transfer exempt assets until the end of the exemption period.
- Enter into a First-Source Agreement with the local job training provider, Worksource Oregon.
- Satisfy additional local conditions (See below.)

### City of Hillsboro:

- **Minimum Investment** of \$1 million is required in the North Industrial Enterprise Zone Area or a minimum of \$250,000 investment in the Downtown and South Industrial Enterprise Zone Areas.
- **Procurement Plan** that increases purchases from Hillsboro-based companies by 10% annually.
- **Job Quality/Wages**: (1) average of all hourly wages must be at least 150% of Oregon minimum wage for a 3 year tax abatement (2) at least 75% of hourly wages must exceed 200% of Oregon minimum wage for a 4-5 year tax abatement; (3) benefits are provided at an hourly value equal or greater than 20.2% of the average hourly salary for all years of exemption and (4) training and advancement opportunities will be offered to all employees.
- **Application Fee** will be paid to the City of Hillsboro in the amount equal to 0.1% of the total estimated value of investment; fee capped at \$50,000.



- **Community Service Fee** is applied each year based on the annual abated taxes relative to employment (jobs) created and retained at the site. Those who provide more employment compared to the amount of tax abatement received would qualify for a lower Community Service Fee in that year. The maximum Community Service Fees are 33% in years 1-3 and 50% in years 4-5 of the program.

## **Application**

Businesses interested in the Hillsboro Enterprise Zone program can obtain application information from Valerie Okada at 503-681-6112 or via email at [val.okada@hillsboro-oregon.gov](mailto:val.okada@hillsboro-oregon.gov)

**Code Fellows PDX** @CodeFellowsPDX Feb 22

Great work today by [#pdxtech](#) on [#diversityintech](#). Huge thx to [@worksystems](#) + [@umpquabank](#) [@akqa](#) [@jaguarlandrover](#) [@metaltoad](#) [@epicodus](#) etc!

2

5



**Code Fellows PDX** @CodeFellowsPDX 24 Jul 2016

Come see if a [#codingcareer](#) is for you! Join us for [#code101](#) on Aug. 13th! [code101-aug16.eventbrite.com/?aff=twitter](#) [@bethadelelong](#) [@codeoregon](#) [@worksystems](#)



**Code Fellows PDX** @CodeFellowsPDX 3 Jul 2016

Proud to partner with [@worksystems](#) & [#rebootnw](#)! Great event [@metaltoad](#) last night, Rekha!



2

2

**Code Fellows PDX** @CodeFellowsPDX 29 Jun 2016

Welcome Code 201 night students. First class is in the bag! @ReBootNW @Worksystems #pdxtech

1

**Code Fellows PDX** @CodeFellowsPDX 28 Jun 2016Congrats @worksystems on the #TechHire grant - Proud to partner with you!  
[bizjournals.com/portland/blog/...](http://bizjournals.com/portland/blog/...) @PDXBizJournal @worksourceor

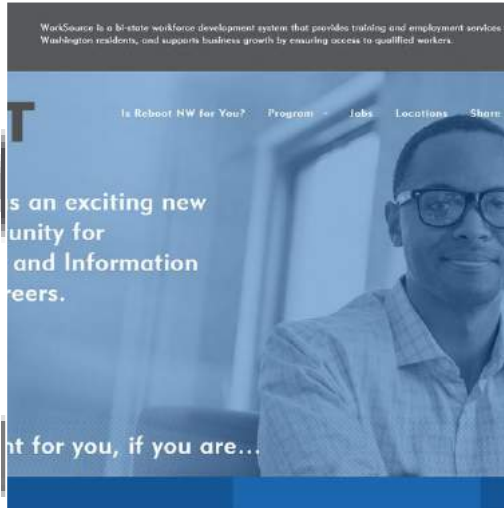
2

3



**Code Fellows PDX** @CodeFellowsPDX 24 Jun 2016

@RebootNW offers tech training grant\$ for the un- & under-employed: [rebootNW.org](http://rebootNW.org) @worksystems #pdxtech



**Jordana Gustafson** @JordyGusto 11 Mar 2015

Proud that @CodeFellowsPDX & #PDXTech are part of the president's #TechHire Initiative. [nyti.ms/1C1tEJB](http://nyti.ms/1C1tEJB) @Worksystems @CodeOregon

4

2

# The Diversity Scholarship Fund

## The Goal

At Code Fellows, we believe everyone should have the opportunity to develop. In reality, many qualified candidates aren't pursuing careers in a technology-related field because they are discouraged somewhere along the way. Some lose interest because they lack role models or encouragement, and others avoid tech or STEM careers because they perceive workplaces to be unfriendly or outright hostile.

The percentages of coders who are women (less than 20 percent), African American (less than 3 percent), or Hispanic or Latino (less than 2 percent) are shockingly low compared to their place in the general population. The low number of veterans moving into tech-related jobs is also surprising considering the leadership and problem-solving skills they can bring.

The market needs more women and underrepresented populations in the tech industry for numerous reasons: for employers, more diversity in tech means an expanded talent pool, improved team culture, and better products; for employees, tech jobs provide a path to high-paying, rewarding careers.

For these reasons and more, we've created the Code Fellows Diversity Scholarship Fund.

## The Program

As an accelerated learning program, Code Fellows offers fast-paced, life-changing training that taps into the potential of ambitious, talented programmers. In months, not years, we help students change their lives and employers meet their hiring needs.



Scholarships from the Diversity Scholarship Fund are need-based, covering up to 70 percent of tuition for recipients. Women, U.S. military veterans, and populations underrepresented in technology (African American, Hispanic, and Native American, including Alaskan and Hawaiian) are eligible to apply for scholarships from this fund. Scholarships are awarded based on financial need and the applicant's ability to meet requirements of both the course and scholarship application.

## How to Apply

If you'd like to apply for a Diversity Scholarship, please ask your Admissions Counselor during your initial phone interview to send you a link to the scholarships application. Scholarships are awarded based on need, and we'll let you know two weeks before the start of class if you've received a scholarship toward our program. You are eligible to apply for a scholarship for every course (even if you've received one in the past).

Ready to apply? Get in touch! (/contact)

## Eligible Courses

### Code 201: Foundations of Software Development

**You will learn** the basics of HTML, CSS, and JavaScript, along with professional development tools and technologies used by software developers around the world.

[Learn More \(/courses/code-301/intermediate-software-development\)](/courses/code-301/intermediate-software-development)

### Code 301: Intermediate Software Development

**You will learn** the common core of software development, including MVC, Object-Oriented Programming, functional programming, asynchronous programming, and much more in this intensive course.

[Learn More \(/courses/code-301/intermediate-software-development\)](/courses/code-301/intermediate-software-development)

### Code 401: Advanced Software Development in Full-Stack JavaScript

**You will learn** to build full-stack web applications with server-side Node.js and modern, client-side, front-end libraries and frameworks, including AngularJS. Throughout this intensive course, you will study professional software development techniques and practices as you advance your skills in JavaScript.

[Learn More \(/courses/code-401/advanced-software-development-in-full-stack-javascript\)](/courses/code-401/advanced-software-development-in-full-stack-javascript)

## Code 401: Advanced Software Development in iOS

**You will learn** how to create iOS games and apps with Swift and Objective-C. Take your app ideas from concept to completion and learn the tools, frameworks, and best practices used by mobile developers around the world.

[Learn More \(/courses/code-401/advanced-software-development-in-ios\)](/courses/code-401/advanced-software-development-in-ios)

## Code 401: Advanced Software Development in Python

**You will learn** the language used at NASA, Instagram, Dropbox, and other big-data companies as you build professional-grade apps in Python. Throughout this intensive course, you will study professional software development techniques and practices as you advance your skills in Python.

[Learn More \(/courses/code-401/advanced-software-development-in-python\)](/courses/code-401/advanced-software-development-in-python)

## Become a Supporter

We need your support! Click the link below to become a Diversity Scholarship supporter! You can also make a tax deductible contribution of any amount to the Diversity Scholarship Fund by sending a check made payable to WTIA, our fund administrator, with the memo: Code Fellows scholarships, to Code Fellows, 2901 3rd Ave., Suite 300, Seattle, WA 98121. You will receive a receipt from WTIA.

[Become a Supporter \(http://washingtontechnology.org/code-fellows/\)](http://washingtontechnology.org/code-fellows/)

## Connect With Us

---

## Learn More

---

## Take a Tour

---

Thursdays  
12:00 - 12:30  
12:30 - 1:00

## Get in Touch

---

© 2017 Code Fellows, Inc. Code Fellows is a licensed Technical Education provider by the state of Washington.

**Buy One. Give One.** For every new Pro account, we'll donate one to a public school student. [Learn more »](#)



# treehouse

- [Features](#)
- [Pricing](#)
- [Sign in](#)
- [Free trial](#)



**Let's get started. Apply for Code Oregon now!**

**What is your name?**

**What is your email address?**

**What do you want your Treehouse password to be?**

**What is your 5 digit ZIP code?** Only Oregon residents can apply

**When is your date of birth?** Must be 18 years or older to participate in this program

Month

Day

Year

**Are you a current WorkSource customer?**

☐ •Yes

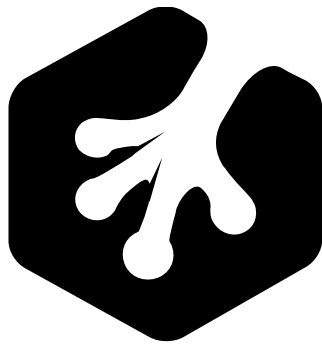
☐ •No

**How did you learn about Code Oregon?**

After clicking the link below, your application will be reviewed for qualifications (you must be 18 years old and an Oregon resident). If you qualify, we'll send a follow-up email with next steps.



**Buy One. Give One.** For every new Pro account, we'll donate one to a public school student. [Learn more »](#)



# treehouse

- [Features](#)
- [Pricing](#)
- [Sign in](#)
- [Free trial](#)



**Let's get started. Apply for Code Oregon now!**

**What is your name?**

**What is your email address?**

**What do you want your Treehouse password to be?**

**What is your 5 digit ZIP code?** Only Oregon residents can apply

**When is your date of birth?** Must be 18 years or older to participate in this program

Month

Day

Year

**Are you a current WorkSource customer?**

☐ •Yes

☐ •No

**How did you learn about Code Oregon?**

After clicking the link below, your application will be reviewed for qualifications (you must be 18 years old and an Oregon resident). If you qualify, we'll send a follow-up email with next steps.

# CODE OREGON: WORKSYSTEMS & TREEHOUSE WILL TRAIN 10,000 OREGONIANS FOR TECH JOBS

JUNE 16TH, 2014

By 2020, there will be one million more computer programming jobs in the U.S. than workers to fill them, and 10,000 of those jobs will be in the Portland metro region. To close the skills gap and prepare area residents with the skills needed to land these jobs, Worksystems has teamed up with Treehouse to build the region's future technology workforce through Code Oregon.



Today's Code Oregon launch marks the region's most aggressive workforce development program. It provides free coding education to 10,000 Portland metro area residents through Treehouse's online learning platform. Worksystems will then place graduating Treehouse students in jobs with leading technology companies with the help of The Technology Association of Oregon.

## Code Oregon Provides National Job-Creation Prototype for High Demand Software Careers

Code Oregon serves to not only bolster the technology talent pipeline to help the state's growing software sector, but also supports Treehouse's national Code-to-Work initiative, which is designed to teach anyone how to code and then secure jobs in the industry.

"Initiatives like Code Oregon help people find high-paying, rewarding jobs more quickly," said Ryan Carson, co-founder and CEO of Treehouse. "We want to start the Code-to-Work movement, which will take someone from no experience, to job-ready, to a rewarding career - all without a degree and zero experience. The rules are all changing. You just don't need a Computer Science degree any more to get an amazing job in the tech industry."

Code Oregon will use Treehouse to teach people in-demand skills in web design, app design and programming. Worksystems will sponsor and distribute 10,000 Treehouse online learning accounts to help area residents' learn coding languages such as HTML, CSS, JavaScript, PHP and Ruby, and development for iOS, Android and WordPress. Top students will be identified and receive additional career services, mentoring and training from

Worksystems to be vetted as job-ready. With the goal of connecting job-ready students with leading tech companies, Code Oregon will host a fall 2014 job fair.

"Code Oregon will establish Oregon as a software talent capital and create a more vibrant and diverse technology workforce by helping anyone become a successful computer programmer," said Andrew McGough, Executive Director of Worksystems. "We are excited to create a prototype that can be scaled across the state and country to reboot depressed economies and provide a career path to high-wage jobs."

# Code-to-Work Training for High-Paying Tech Jobs

## Commitment by Treehouse Island, Inc.

In 2014, Treehouse committed to partnering with Workforce Investment Boards and community-based organizations to put 150,000 people back to work in high-paying tech jobs across America. Treehouse will scale the Code-to-Work prototype to five WIBs per year in different regions, to train 10,000 adults in each region. In conjunction with adult retraining, Treehouse will donate matching K-12 public school accounts to build a tech talent pipeline.

SHARE 35 0 0

## RECENT STORIES

### A Year in Review: 11 Inspiring Moments from 2016

BY [DONNA E. SHALALA](#) | DEC 22, 2016

Since 2001, the Clinton Foundation has worked to improve lives around the world and build upon President Clinton's legacy of public service. [Read More](#)

### This week: The Foundation's Programs at Work

BY [DONNA E. SHALALA](#) | OCT 28, 2016

Here are the latest updates of some of the Foundation's programs at work: [Read More](#)

[View All Stories](#)

[Overview](#) | [Details](#) | [Progress Reports](#)

## October 2015

Thus far, 8,062 students have registered with Code Oregon, and 1,112 Code Oregon students have registered with a career program. In addition, Treehouse has distributed approximately 5,000 scholarship accounts to NCWIT, Girls Inc., ChickTech, The Muse and other female empowerment organizations to expand access to relevant coding curricula.



[MEMBER LOGIN](#)[About Us](#)[Meetings](#)[Commitments](#)[Stories](#)[CGI U](#)

#### COMMITMENT TO ACTION

## Code-to-Work Training for High-Paying Tech Jobs

Commitment by Treehouse Island, Inc.

In 2014, Treehouse committed to partnering with Workforce Investment Boards and community-based organizations to put 150,000 people back to work in high-paying tech jobs across America. Treehouse will scale the Code-to-Work prototype to five WIBs per year in different regions, to train 10,000 adults in each region. In conjunction with adult retraining, Treehouse will donate matching K-12 public school accounts to build a tech talent pipeline.

SHARE

35

0

0

## RECENT STORIES

[A Year in Review: 11 Inspiring Moments from 2016](#)

BY [DONNA E. SHALALA](#) | DEC 22, 2016

Since 2001, the Clinton Foundation has worked to improve lives around the world and build upon President Clinton's legacy of public service. [Read More](#)

## This week: The Foundation's Programs at Work

BY [DONNA E. SHALALA](#) | OCT 28, 2016

Here are the latest updates of some of the Foundation's programs at work: [Read More](#)

[View All Stories](#)

[Overview](#) | [Details](#) | [Progress Reports](#)

### APPROACH:

In 2014, Treehouse committed to partnering with Workforce Investment Boards and community-based organizations to put 150,000 people back to work in high-paying tech jobs across America. Treehouse will scale the Code-to-Work prototype to five WIBs per year in different regions, to train 10,000 adults in each region. In conjunction with adult retraining, Treehouse will donate matching K-12 public school accounts to build a tech talent pipeline.

Treehouse will provide quality on-line training for in-demand computing jobs and identify students with job-ready skills for additional training, mentoring, and career placement services in partnership with WIBs and their community-based partners (non-profits serving veterans, immigrants and refugees as well as community colleges). Treehouse will build partnerships with tech employers to align education with needs of a rapidly-evolving industry.

### TRAINING

Treehouse will provide quality on-line training with 1,000+ interactive video tutorials and code challenges in high demand languages such as iOS, Android, HTML, CSS, WordPress, PHP, Python, JavaScript, Ruby, more taught by teachers with industry expertise. Treehouse offers accelerated and relevant job training, with most students building job-ready skills within 6-12 months. Students will earn digital badges to demonstrate proficiency in web design, programming, and app design and build a digital portfolio for jobs.

### MENTORING

Treehouse will leverage WIBs and their community partners for additional mentoring and career counseling and connect students with tech industry mentors to guide and expand career paths.

### CAREER PLACEMENT

Treehouse will identify job-ready students through a leaderboard and algorithm that tracks badges/points earned in courses that map to industry needs, in addition to assessing digital

portfolios. WIBs will provide career placement services to job-ready students and facilitate placements through on-the-job training funding. Treehouse will partner with WIBs, tech associations, and chambers of commerce to host job fairs that connect students with regional employers.

#### ACTION PLAN:

Q3 - 2014 - Begin outreach to WIBs and secure five partners (10,000 adults each WIB).

Q4 - 2014 - Begin training, enlist Chambers of Commerce, Tech Associations and industry employer partners, plan job fairs, donate matching K-12 accounts to build tech talent pipeline.

Q1 - 2015 - Leverage WIBs and community partners for additional mentoring, training, career counseling.

Q2 - 2015 - Host job fairs, place Code-to-Work participants.

Q3 - 2015 - Begin outreach to WIBs and secure next five partners (10,000 adults each WIB).

Repeat cycle of training, mentoring, career counseling, job fairs, job placements.

## Background

Treehouse seeks to solve poverty, unemployment, lack of education, and rising income inequality by providing job-ready skills for a digital economy. Treehouse's online learning platform expands access to high-poverty and rural areas that lack tech teachers and enables displaced workers to retrain for high-paying jobs. As students graduate with massive debt and no marketable job skills, Treehouse provides affordable, accessible job training.

By 2020, there will be 1 million more coding jobs available than people to fill them - a billion salary opportunity. Computing jobs are growing at twice the national average and pay 75% more than the median annual salary.

In June 2014, Treehouse launched Code Oregon with the goal of getting 10,000 Oregonians back-to-work in high demand tech jobs. We seek to scale this prototype to 5 regions per year, to reboot depressed economies, empower Americans to economic self-sufficiency, and inspire the next generation of innovators.

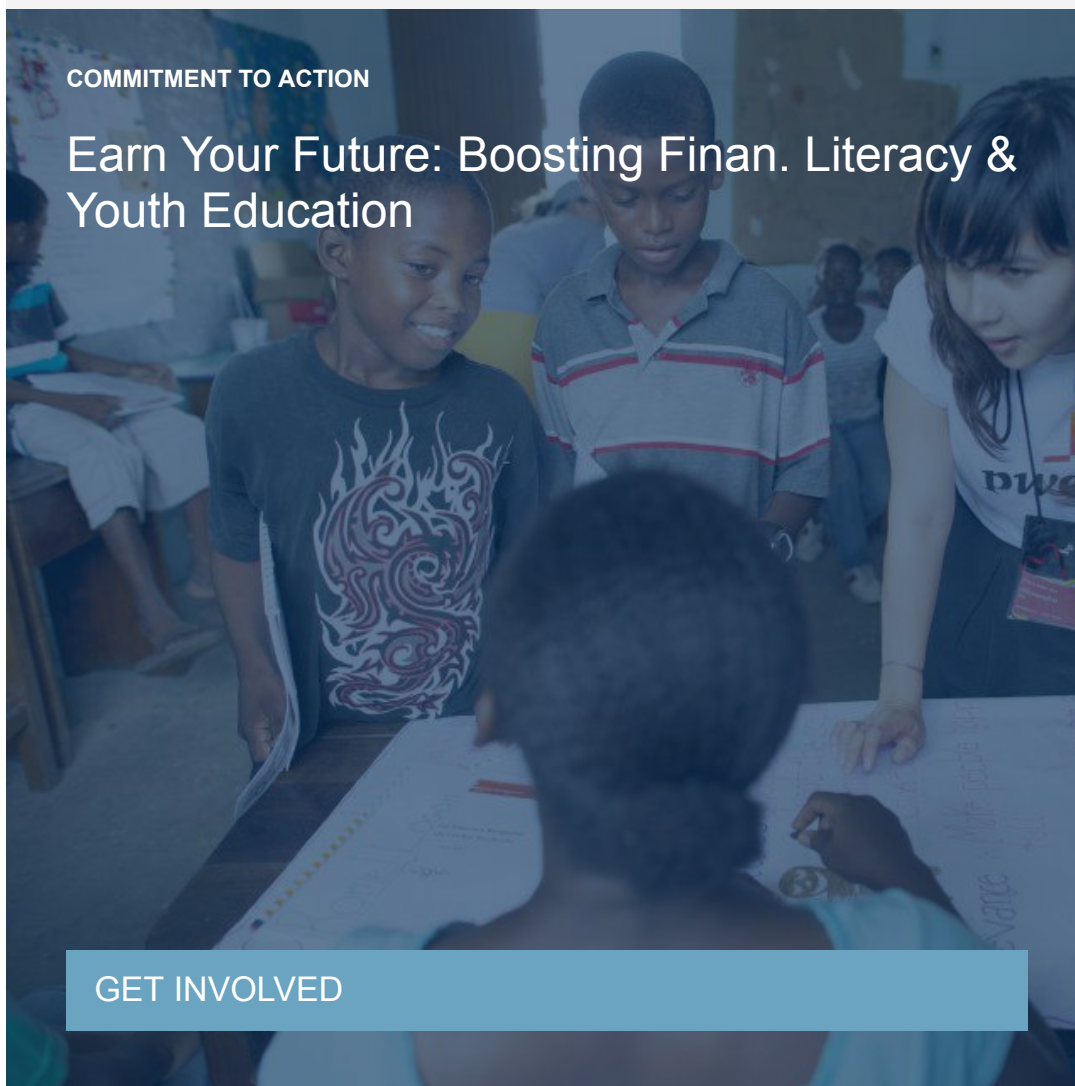
## Partnership Opportunities

We are seeking to connect with implementing partners to scale our commitment including: Mayors, WIBs, Veterans, Community Colleges, community-based organizations, mentors (particularly

women and minorities in tech), Chambers of Commerce, tech employers. Financial partners to sponsor training and outreach efforts are valued.

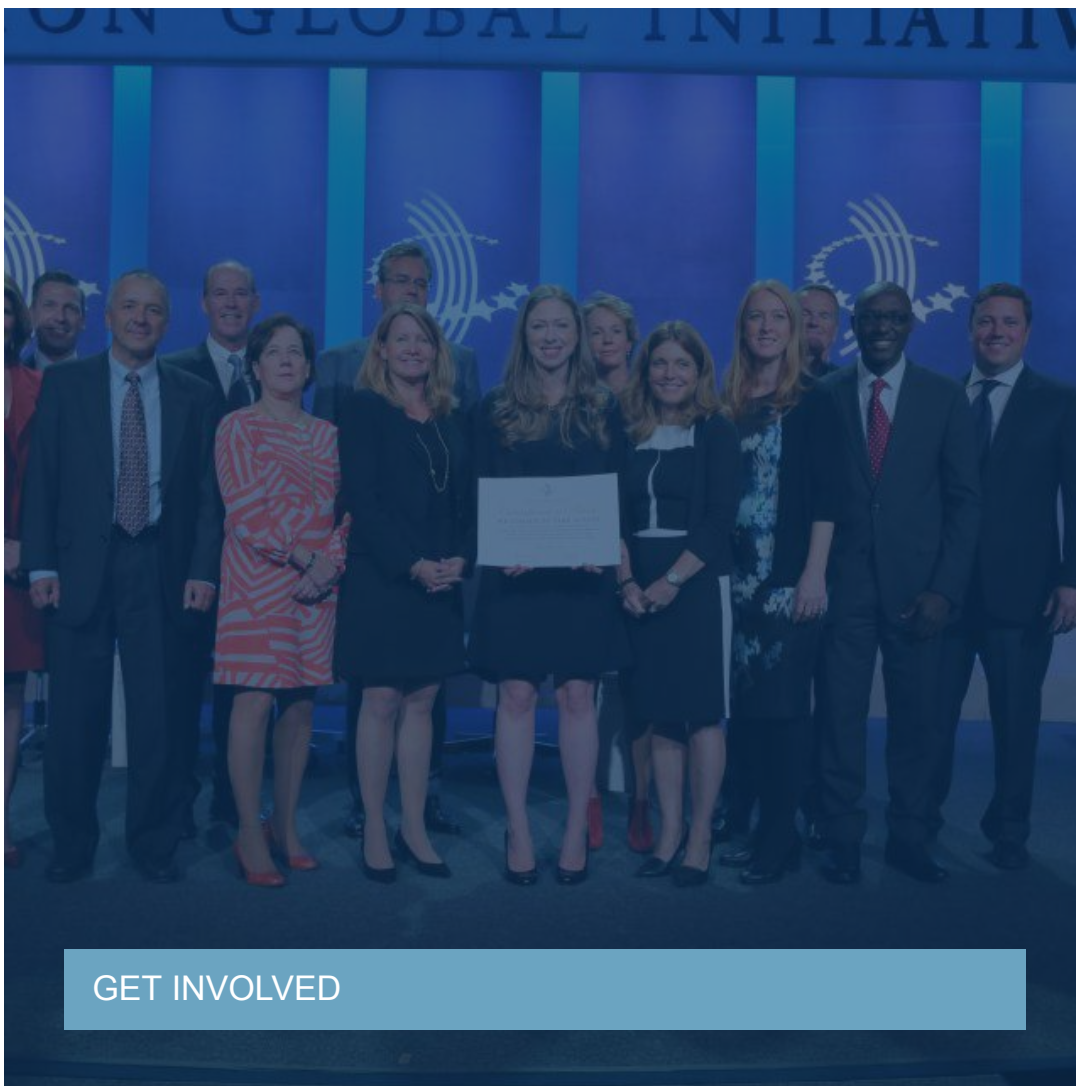
We offer quality on-line interactive training in high-demand languages such as iOS, Android, HTML, CSS, WordPress, PHP, Python, JavaScript, Ruby, and more. Treehouse's leaderboard incentivizes skill-building and competition for top jobs by tracking badges unlocked and points earned by participants to demonstrate proficiency. We identify job-ready students through an algorithm and career program and help match qualified students through our careers program.

## EXPLORE MORE WAYS TO TAKE ACTION



COMMITMENT TO ACTION

### Securing Wetland Carbon Stores for Climate



COMMITMENT TO ACTION

Girls CHARGE





GET INVOLVED

[Browse All Commitments to Action](#)

## FROM AROUND THE FOUNDATION

BLOG POST

The Foundation at Work: Presidential Scholars Convene in D.C., CGI U announces 2017 Meeting in Boston, and a Day of Action to address Diaper Need in New York

[View More Stories](#)



DONNA E. SHALALA | FEBRUARY 11, 2017

## BLOG POST

# Charting Our Path Forward



PRESIDENT BILL CLINTON | FEBRUARY 2, 2017

## BLOG POST

# 8 Inspiring Student Ideas to Jumpstart Action on Your Campus



## 2016 SPONSORS | MEMBERSHIP

1271 Avenue of the Americas  
42nd Floor  
New York, NY 10020  
212-348-8882



[Our Work](#)

[About](#)

[2014 Consolidated  
Expenditures](#)

Get Involved

Blog

Ways to Give

Donate


Press

Presidential Center

Contact Us

Careers

87.2%



Program Services

8.6%  
Management and General

3.7%  
Fundraising

0.5%  
Provision for Uncollectible Pledges

Site Map | Fraud Alert | Terms of Use | Privacy Policy

The Clinton Foundation is a 501(c)(3) not-for-profit organization



# Code-to-Work Training for High-Paying Tech Jobs

## Commitment by Treehouse Island, Inc.

In 2014, Treehouse committed to partnering with Workforce Investment Boards and community-based organizations to put 150,000 people back to work in high-paying tech jobs across America. Treehouse will scale the Code-to-Work prototype to five WIBs per year in different regions, to train 10,000 adults in each region. In conjunction with adult retraining, Treehouse will donate matching K-12 public school accounts to build a tech talent pipeline.

**SHARE****35****0****0**

## RECENT STORIES

### A Year in Review: 11 Inspiring Moments from 2016

BY [DONNA E. SHALALA](#) | DEC 22, 2016

Since 2001, the Clinton Foundation has worked to improve lives around the world and build upon President Clinton's legacy of public service. [Read More](#)

### This week: The Foundation's Programs at Work

BY [DONNA E. SHALALA](#) | OCT 28, 2016

Here are the latest updates of some of the Foundation's programs at work: [Read More](#)

[View All Stories](#)

[Overview](#)

| [Details](#)

| [Progress Reports](#)

## SUMMARY

### Commitment

Code-to-Work Training for High-Paying Tech Jobs

### Launched

2014

### Est. Duration

4 years

**Estimated Total Value**

\$18,350,000

**Region**

Northern America

**Countries**

United States

**Commitment by**

Treehouse Island, Inc.

**Partner(s) of the Commitment Maker(s)**

KentuckianaWorks, Girls Inc, App Camp for Girls, ChickTech, National Center for Women & Information Technology (NCWIT), The Muse, Worksystems, Inc.

## Our Core Partners

- School Districts: Beaverton, Forest Grove, Hillsboro, Portland, and Banks
- PCC, PSU, OHSU, U of P, and OSU
- Worksystems Inc., Vernier, Intel, JPMorgan Chase, First Tech, PGE, and Clean Water Services
- N/NE STEAM Coalition, Impact NW, Groundwork Portland, and CDE
- OMSI, Outdoor School, Oregon Zoo, SOLVE, Girls Inc.
- City of Portland and Metro





## JOINT CITY COUNCIL/WASHINGTON COUNTY BOARD MEETING AGENDA

Tuesday, August 26, 2014

7 PM

Public Services Building Auditorium

Special Session

155 N. First Avenue

---

### Mayor Jerry W. Willey

Council President Aron Carleson

Councilor Darell Lumaco

Councilor Steve Callaway

Councilor Olga Acuña

Councilor Megan Braze

Councilor Fred Nachtigal

---

All testimony is electronically recorded. Public participation is encouraged.

For online meeting materials, Mayor and City Councilor bios and more, visit

<http://www.hillsboro-oregon.gov/council>.

This meeting will be broadcast live by Tualatin Valley Community Television (TVCTV) Government Access Programming. To obtain the monthly programming schedule, contact

TVCTV at (503) 629-8534 or visit

<http://www.tvctv.org/index.php/hillsboro>.

### MISSION STATEMENT

*The City of Hillsboro is dedicated to providing visionary leadership, delivering responsive municipal services, and fostering collaborative partnerships that enhance Hillsboro's hometown livability.*

**SPECIAL SESSION – 7 PM – PUBLIC SERVICES BUILDING AUDITORIUM**

**CALL TO ORDER – Roll Call**

**1. PUBLIC HEARINGS:**

- A. Proposed 2014 Strategic Investment Program agreement

**2. NEW BUSINESS:**

- A. Consider approving an agreement with Washington County and Intel Corporation regarding the 2014 Strategic Investment Program.



**AGENDA****JOINT HILLSBORO CITY COUNCIL –  
WASHINGTON COUNTY BOARD OF COMMISSIONERS****Agenda Category:** Public Hearing – County/City Administrative Staff (CPO All)**Agenda Title:** **PROPOSED 2014 STRATEGIC INVESTMENT PROGRAM  
AGREEMENT BETWEEN WASHINGTON COUNTY, THE CITY  
OF HILLSBORO AND INTEL CORPORATION****Presented by:** Robert Davis, County Administrator

---

**SUMMARY:****Background**

Created by the 1993 Legislature, the Strategic Investment Program (SIP) was designed to increase Oregon's ability to attract and retain capital-intensive industry and jobs, particularly in high-technology industry. Currently two Intel-Washington County SIP agreements are in place; one approved in 1999 and another in 2005. The 1999 agreement granted a partial tax exemption for investment up to \$12.5 billion and the 2005 SIP granted partial tax abatement up to \$25 billion of investment.

**Summary of Proposed Agreement**

Washington County, the City of Hillsboro and Intel have been in formal negotiations to develop a new Strategic Investment Program agreement (2014 SIP) as Intel approaches the \$25 billion investment limit under the existing 2005 SIP. The new SIP would set the stage for continuing investment within Washington County and would continue the successful model developed in the 1999 and 2005 SIPs.

The 2014 SIP investment cap is proposed to increase to \$100 billion, reflecting the rapidly accelerating cost of research and development of new technologies. The 2014 SIP is generally characterized as a job retention program and is expected to have only incremental increases in employment and new building as it anticipates the investment will be primarily in development and retooling of machinery and equipment.

(continued)

Clerk's Desk Items: [Staff Report](#) and [2014 SIP Agreement](#)

---

**COUNTY ADMINISTRATOR'S RECOMMENDATION:**

Hold the public hearing and approve the proposed 2014 SIP agreement between the County, the City of Hillsboro and Intel, and authorize the Vice Chair to sign a letter on behalf of your Board requesting approval by the Oregon Business Development Department/Commission.

Agenda Item No.	<b>7.a.</b>
Date:	08/26/14

**PROPOSED 2014 STRATEGIC INVESTMENT PROGRAM AGREEMENT BETWEEN  
WASHINGTON COUNTY, THE CITY OF HILLSBORO AND INTEL CORPORATION  
BCC 8/26/14**

The general terms and conditions incorporated in the 1999 and 2005 SIPs are reflected in the proposed 2014 SIP but allow for the potential of multiple “investment packages.” Each investment package allows for 15 years of tax abatement, consistent with prior SIPs, and includes negotiated fees with each investment package. The multiple investment packages, with abatement under each package, must occur within 30 years from the signing of the agreement.

Overview of Fees and Taxes Proposed in the 2014 Intel SIP

- 30-year term (project horizon)
- Allows for multiple investment packages
- Each investment package allows up to 15-year abatement
- Maximum investment (“project cap”) of \$100 billion
- Applies to sites within the City of Hillsboro and the Aloha campus

Statutory Taxes and Fees Applied to each “Investment Package”

- Ad Valorem Property Taxes: Ad valorem property taxes are calculated based on the first \$100 million in real market value, increased annually for growth at the rate of 3%, and taxed at its assessed value as defined by law. Property in excess of this amount is exempt from ad valorem taxation as defined by law.
- Community Service Fee (CSF): The CSF is an annual payment equal to 25% of the property taxes exempted each year, not to exceed \$2 million in any one year.

Negotiated Fees and Payments

- Guaranteed Annual Payment (GAP): The GAP for this SIP is \$2.87 million per year in each year that tax abatement is extended under this agreement. As in prior agreements, GAP payments do not overlap with other SIP agreements, so the GAP for the 2014 SIP will begin in 2025 and continue annually for up to 20 years.
- Fee-In-Lieu (FIL) of Property Taxes: A FIL is paid on each investment package. In no event shall this fee be less than the amount of property tax that would have been due on any land or buildings within the investment package assuming no tax exemption. Thus, the Fee-In-Lieu is the greater of these two calculations:
  - Cumulative Investment calculation:  

$$(\text{ad valorem property taxes} + \text{CSF}) * (\text{cumulative investment/project cap})$$
  - Land & Building calculation:  

$$\text{assessed value of land \& buildings} * \text{total tax rate for the subject year}$$
- Charitable Fee: The agreement defines a Charitable Fee of \$100,000 annually for six years starting on the execution date of the agreement. These funds shall be earmarked for public or private non-profit organizations fulfilling a public purpose in Washington County.

**PROPOSED 2014 STRATEGIC INVESTMENT PROGRAM AGREEMENT BETWEEN  
WASHINGTON COUNTY, THE CITY OF HILLSBORO AND INTEL CORPORATION  
BCC 8/26/14**

Comparison between the Proposed 2014 SIP and the 2005 SIP:

	2005 SIP	Proposed SIP
Investment Cap	\$25 billion	\$100 billion
Investment	One 15-year investment package	Multiple 15-year investment packages over 30 years, each with its own CSF, FIL, and ad valorem
Geographic Scope	City of Hillsboro Aloha campus	City of Hillsboro Aloha campus
Ad Valorem Property Taxes (statutory)	First \$100 million in RMV goes on tax rolls and increases 3% annually	First \$100 million in RMV of each investment package goes on tax rolls and increases 3% annually
Community Service Fee (statutory)	Maximum of \$2 million annually	Maximum of \$2 million annually for each investment package
Guaranteed Annual Payment (negotiated)	\$2.87 million annually over 10 years Deferred during overlap period (thru FY14-15)	\$2.87 million annually over 20 years as long as abatement continues Deferred during overlap period (thru FY24-25)
Fee-In-Lieu (negotiated)	Greater of two calculations: <ul style="list-style-type: none"> <li>Land &amp; Building (“full freight”)</li> <li>Cumulative Investment</li> </ul>	For each investment package, greater of two calculations: <ul style="list-style-type: none"> <li>Land &amp; Building (“full freight”)</li> <li>Cumulative Investment</li> </ul>
Charitable Fee (negotiated)	\$100,000 annually for first six years of agreement	\$100,000 annually for first six years of agreement

## **Strategic Investment Program Policy Review**

### **Proposed 2014 Strategic Investment Program (SIP) Agreement**

---

The following staff report is a review of the proposed 2014 SIP Agreement based on Evaluation Criteria in the County's adopted SIP Retention Policy. Relevant parts of the policy are in *italics* under each major section of the policy.

#### **A. Is the Tax Exemption Needed to Retain Jobs?**

- *Is the property tax exemption needed to retain jobs?*
- *Will the tax exemption make a major contribution to keeping the company competitive in the global marketplace?*
- *What impact will the investment have on retaining the firm in the County and positioning the firm for long-term viability in its line of business?*
- *Does this investment ensure that the firm will maintain a long-term presence in the County?*
- *Will the tax exemption clearly result in the retention of jobs in the future that might otherwise not be retained?*

Many factors enter into a major corporate site investment decision, including: land cost and availability; availability and/or the ability to attract a quality labor pool; utility costs, availability and reliability; adequate transportation to and from suppliers and markets; local infrastructure and quality of life; synergy with existing suppliers and collaborators; and, of course, local and state taxes and fees.

To determine whether the SIP tax abatement is necessary to attract and retain the proposed future investment (beyond the clear statements of the applicant to that end), it is necessary to determine that:

- Property taxes, under the state and local property tax system, would materially affect the economics of the proposed investment to the point that it would likely go to an area that would provide more favorable treatment, and
- The applicant has access to reduced taxes in other potential site locations.

It is clear that Intel must continue to make significant investment in new technologies in order to maintain its position as the premier developer and manufacturer of microprocessor technologies. Intel's estimates of the level of future technology investments dwarfs the company's previous investment made in Washington County and is unique among all Oregon companies, if not the entire country. As evidence of the escalating costs of technology investment necessary to remain the premier developer in the industry, Intel's investment under the 1999 SIP was \$12.5 billion. The 2005 SIP allows for a \$25 billion investment that is likely to be made by 2016, and the proposed 2014 SIP agreement contemplates \$100 billion in investment.

*As Intel states in an opening letter to Washington County, "A new agreement will provide a framework for potential additional Intel investment in Oregon... commencing when the current SIP agreement approaches the limits of its investment ceiling. As Intel's research presence in Oregon grows, the associated investments have risen faster than anticipated. A new agreement is necessary in order to enable that ongoing investment".*

Historically, the market for investments of this type has focused primarily on sites in the United States, including operations in Oregon, California, New Mexico, Massachusetts and Arizona. However, the company has also invested in operations abroad in Israel and Ireland.

Staff has reviewed the tax structures in other states in previous site selection processes, including the aforementioned sites. Although difficult to make an "apples to apples" comparison, it is readily apparent that other viable locations in the United States offer incentives, programs and tax structures that appear to be more favorable than the incentives offered in Washington County. As for the sites abroad, the government incentives and involvement in projects of this magnitude are so extensive that it appears unreasonable to attempt to compare or compete with those foreign sites.



For purposes of this section of the report, staff has concluded the following:

- An investment of this magnitude (\$100 billion) is clearly a leading investment in microprocessor technology in the global marketplace and thus, would be highly sought after globally with other sites potentially offering packages of incentives well beyond those offered by Washington County.
- Although financial incentives (partial tax abatement in the case of Washington County) are an important and necessary element to Intel's future site investment decisions, the company has made significant investments in Washington County through several prior SIPs and this SIP would build on the investment and infrastructure currently existing in Washington County.
- The proposed 2014 SIP appears to offer adequate flexibility and incentive to retain major investment in future technology here in Washington County.

The proposed investment of \$100 billion, facilitated by the 2014 SIP, would provide considerable assurance (but no guarantee) that Intel will continue to have a major presence in Washington County. Intel officials believe future investment of this magnitude in Washington County will keep Intel competitive in world markets and will greatly increase the likelihood that Oregon will continue to be a major design, development and manufacturing center for the corporation.

The staff conclusion is Intel would not proceed with an investment of this scale in Washington County without the proposed SIP. Although the current presence in Washington County would likely continue into the near future without the proposed SIP, over time Washington County would cease to be a major technology center for Intel and the quantity and quality of jobs and economic impacts would decline.

**B. Nature of the Retained Jobs**

- *How many jobs will be created or retained, both now and in the future?*
- *What types of jobs are they: what do they pay? How many new or retained jobs will be part of such program?*
- *A minimum of 50% of retained jobs should be permanent and pay at or above the average covered wage in Washington County*
- *Firm must provide industry standard benefits to permanent employees*
- *What training programs will the firm implement for job retention?*

The proposed 2014 SIP agreement would pave the way for future investment in Washington county with the expected result of retaining existing positions in Oregon and Washington County, as well as a conservative estimate of 500 additional jobs over 30 years. Based on Intel's application to Business Oregon for the 2014 SIP and the Annual Employment Report, dated April 17, 2014, estimated average annual salary for the retained and newly created jobs is \$140,954. The estimated average Intel wage is over three times the average gross personal income in Oregon.

The average total compensation, including discretionary fringe benefits, is reported to be \$184,578; which suggests that discretionary fringe benefits average \$43,624, or over 30% of annual salary.

**C. Employee Residence Patterns**

- *Where do employees holding retained jobs live?*
- *How many of the retained employees and replacement hires for potential vacancies will be Washington County residents?*
- *How many are residents of the Portland and Metro area?*
- *What efforts will the firm make to hire locally?*
- *The County's goal is that new and replacement employees be Washington County residents or, secondly, current residents of the Portland metropolitan area.*

The ECONorthwest Economic Impact Study of Intel's Oregon Operations analysis , completed in 2012, found that over 12,000 (>70%) of Intel employees live in Washington County and well over 90% live in the Portland Metro area. As with previous SIP agreements, the proposed 2014 SIP requires Intel to enter into a first

source agreement to ensure employment opportunities for qualified local residents.

#### **D. Economic Impact/Multiplier**

- *What will be the multiplier effect of the project on the County's economy?*
- *What jobs will be retained, and what potential new jobs will be created by supplier firms?*
- *The County may develop its own economic impact report.*

The impact of Intel's current operations on the Washington County, Portland Metro and the State of Oregon's economy is profound. As the largest private employer in the State of Oregon, Intel currently employs over 17,500 employees in the State. The ECONorthwest Economic Impact Study completed in 2012 found that for every direct job at Intel, 3.1 indirect and induced jobs are created statewide. The following are additional excerpts from the 2012 Economic Impact Study:

- 16,500 – Intel employees in Oregon as of 2012
- 3.1 – Jobs created statewide for every direct Intel job “multiplier effect”
- 67,579 – Total jobs attributed to Intel statewide
- \$26.7 billion – Total economic impact of Intel in 2012
- \$136 million – Property tax revenue generated by Intel in 2012
- \$192 million – Personal state income tax revenue generated by Intel in 2012
- Portland Metro:
  - 9.2% of jobs due to Intel
  - 6.1% of personal income due to Intel
- Washington County:
  - 16.7% of jobs due to Intel
  - 25.2% of personal income due to Intel

The “multiplier effect” of 3.1 jobs created for each direct Intel job appears to be relatively consistent over time and is expected to continue to have a similar impact under the 2014 SIP. Although the conservative estimate of 500 new jobs

over the 2014 SIP is a modest increase relative to past SIP's, the impact on the local and State economy is immense. In addition to the new jobs created, the proposed SIP would likely retain the estimated 67,579 jobs attributed to Intel statewide.

### **E. Balance of Community Benefit and Tax Advantage**

- *Are the benefits the community will receive from the project generally reasonable in light of the benefits the firm will receive in terms of taxes avoided?*

Oregon's current tax system was not designed with Intel and other high-tech manufacturing companies in mind. The Oregon system levies the full property tax rate on industrial personal property machinery and equipment. This system, applied in most all industrial cases, does not generate gross inequities. However, when applied to the extraordinarily high level of investment in high-tech machinery and equipment necessary in this particular case, it yields gross inequities. As an example, the \$100 billion dollar investment proposed in the 2014 SIP is over 10 times the assessed value of the entire City of Hillsboro or about twice the assessed value of Washington County. The Legislature recognized this when it created the Strategic Investment Program in 1993. While the SIP is applied on a case-by-case basis, it is similar to the broadly applied forest and farming alternate tax structures that recognize the unique nature of the target industry and offer an alternative tax structure.

Should the proposed 2014 SIP agreement be approved, Intel would continue to pay a fee on its land and buildings at a rate proportionate to those made by every other business in Washington County. The alternative tax approach applies to Intel's investment in chip-making and research and development equipment, which costs billions of dollars to create and can become obsolete after two to four years. This approach would help continue Intel's level of investment in Washington County and retain existing jobs as well as generate new jobs. It would also continue to generate property tax, fees and income tax for city, school, county and state services.

Perhaps the greatest benefit of the agreement is that by extending partial tax abatement via the 2014 SIP agreement, it would bring a large measure of stability to the tax environment out into the future. That predictability increases Oregon's competitive advantage for cutting edge technology enterprises.

Finally, "taxes avoided" is largely theoretical. The applicant has been very clear, and stated on numerous occasions, that the existing property tax code, unaltered by programs like the SIP, would preclude future investment of anywhere near the scale contemplated in the proposal. Therefore, the argument of "taxes avoided" appears to be irrelevant, in that it is highly unlikely an investment of this magnitude would be made without addressing the inequities of the current tax system as it applies to this unique situation.

## **F. Economic or Social Conditions**

- *Are there any economic or social conditions that would make a project more or less desirable at the time it is proposed (for example high unemployment, recent layoffs, etc.)?*

The focus of the SIP structure is to ensure that existing jobs are maintained, opportunities for advancement exist, and that any significant growth will be accompanied by appropriate infrastructure investment. The project is desirable in that it provides additional revenues to local and state jurisdictions without requiring significant additional investment in infrastructure or public services given the modest estimated increase in new employment. Accordingly, the significant benefit of the proposal is to continue to bring a large measure of stability to the local economy, mitigating the effects of a recession in Washington County. That is what, in fact, Washington County experienced during the "great recession" when Intel continued to invest and build new infrastructure. Stability is key to maintaining a sustainable local economy for the large and small firms that serve Intel directly, as well as those that serve the workforce of approximately 17,500.



## G. Measurable Benefits

- *Are the benefits provided by the project easily measurable?*
- *Will the firm agree to include those benefits as obligations in an agreement between the firm and the County?*
- *Will the firm agree to monitor and recapture provisions in the agreement?*

Community benefits from a proposed project of this magnitude can include economic, social, cultural and fiscal benefits. The economic benefits are readily measurable and discussed in section “D”. The social benefits through civic involvement and charitable giving are covered in section “I”.

This section focuses on the fiscal benefits (payments to local jurisdictions) of the proposed SIP agreement. Much attention was paid in the development of the proposal to “insulating” the County and local jurisdictions from the uncertain nature of the future investment volatility. While Intel has a relatively high level of confidence in the order of magnitude of future investment required, evidenced by their consistent investment performance under several previous SIPs, the timing and phasing of investment packages is speculative. This uncertainty on County finances is mitigated by several factors:

- Fees previously applied to SIPs in total would now apply to each “investment package” identified under the proposed 2014 SIP
- A guaranteed annual payment of \$2.87 million will be made, regardless of amount and timing of investment, as long as a partial tax abatement is extended.
- A Fee in Lieu is calculated on each investment package which would require Intel to pay an amount equal to what otherwise would be taxed on land and building or, in the case of an investment package of only machinery and equipment investment, a fee on the cumulative investment.

All the information required to measure the investment and assessed value underlying Intel’s fiscal obligations to the County is statutorily required to be

provided and there is a long- standing track record of timely and adequate reporting.

The structure of these payments is incorporated into the proposed agreement, providing appropriate sanctions, including in some cases revocation of the tax exemption and recapture of taxes, if Intel fails to meet its obligations under the agreement.

## H. Public Service Impacts

- *What will be the public service impacts i.e., police, fire, schools capacity, roads) associated with the projects?*

The proposed 2014 SIP is characterized as a job retention project and is not expected to result in significant additional public service impacts. Public service impacts largely result from increased employment. The 2014 SIP project does not anticipate significant impact-inducing events in that there is not anticipated to be significant job growth.

## I. Corporate Citizenship

- *Is the firm a corporate citizen in good standing in Washington County*
- *Does the firm participate positively in community programs, volunteer and civic organizations?*
- *Is the firm active in assisting the County, other municipalities and civic organizations in bettering the lives of Washington County and Oregon residents?*

Intel has a long standing record as a positive corporate citizen in Washington County. Intel is a significant contributor to Washington County, regional, and statewide charities, nonprofits, and schools.

The following charitable contributions are reported in the ECONorthwest 2012 Economic Impact Study of Intel's Oregon operations:

Year	Washington County	Portland Metro	Oregon
2010	\$1,751,034	\$5,924,656	\$6,666,922
2011	\$1,806,316	\$6,055,489	\$6,792,474
2012	\$1,894,328	\$6,238,426	\$7,276,701

## **2014 STRATEGIC INVESTMENT PROGRAM AGREEMENT**

Washington County, a political subdivision of the State of Oregon (the “County”), the City of Hillsboro, a municipal corporation (the “City”), and Intel Corporation (“Intel”), enter into this Strategic Investment Program (“SIP”) Agreement (the “2014 SIP Agreement”).

### **RECITALS**

A. The 1993 Oregon Legislature established the SIP to promote industrial competitiveness. The program was significantly revised by the 1995 Legislature, in particular to remove the requirement that State revenue bonds be issued in association with a SIP. Additional statutory refinements were made in 2003. The key provisions are codified at ORS 307.123 and ORS 285C.600 – 285C.620.

B. The SIP encourages counties and cities to enter into agreements with key industries to attract and retain industrial investment and employment. In exchange for limits on ad valorem property taxation, counties receive a community service fee and may negotiate such additional terms and conditions as are deemed to be in the public interest.

C. The parties previously have entered into SIP agreements that have resulted in significant benefits to Intel, the County, the City, and the public generally.

D. On March 21, 2014, Intel notified the County and the City that it wanted to enter into formal negotiations to develop a new SIP agreement. Intel also has provided to the County a copy of the Oregon Business Development Department (“OBDD”) required draft SIP application. The final SIP application will be submitted to the OBDD once the parties have fulfilled their requirements under State law and regulations. The SIP application requested that Intel and the County enter into a SIP Agreement to provide a framework for potential additional Intel investment in Oregon of up to \$100 billion over a

thirty (30) year period commencing around the time when the current SIP agreement (“2005 SIP”) between Intel and the County approaches or reaches the limits of its current investment ceiling. The higher investment amount in this 2014 SIP Agreement reflects the accelerating cost of the research and development of new technologies, and the significantly increased cost of building, equipping, and retooling semiconductor factories with the latest technology. The intent of this 2014 SIP Agreement is to extend the competitive tax structure in Washington County that is essential for Intel to provide high-value, family wage jobs in Oregon and continue to contribute to the state’s quality of life.

E. In general terms, Intel’s investment will consist primarily of proposed investments in semiconductor manufacturing equipment and facilities to promote job retention of its semiconductor manufacturing and semiconductor technology development work force. Intel envisions employment retention and growth consistent with that Agreement dated December 6, 2013 between Intel and the State of Oregon, pertaining to income tax certainty.

F. Capital expenditures made under this 2014 SIP Agreement will take place in the City or the existing Aloha and Ronler Intel campuses, including, but not limited to, facilities that were the subject of the SIP agreements previously approved in 1994, 1999 and 2005 by the County, the City, and the State of Oregon (“Prior SIPs”). These new capital expenditures may include semiconductor manufacturing and semiconductor technology development facilities, machinery and equipment, land for these facilities, and directly related support facilities and office buildings. Any such capital expenditures will require and be made through additional spending beyond the scope of the Prior SIPs and in excess of the dollar amounts approved for the Prior SIPs.

G. The OBDD has issued revised administrative rules implementing the statutory provisions (OAR 123-623-1000 through 123-623-2000).

H. The County and Intel have provided public information and an opportunity for public input regarding the SIP generally and Intel's 2014 SIP application specifically, including a formal public hearing on this 2014 SIP Agreement held on [Date TBD, 2014].

I. This 2014 SIP Agreement provides the terms and conditions under which the County agrees to recommend to the State of Oregon that the 2014 SIP application be approved and tax abatement be granted for semiconductor manufacturing and semiconductor technology development machinery, equipment, and facilities as described herein and as provided by law in exchange for performance by Intel of the obligations herein.

## **TERMS AND CONDITIONS**

Now, therefore, in consideration of the following mutual promises, the parties agree as follows:

### **1. Project and Investment Definition and Scope.**

1.1 The "Project" shall consist of investments in semiconductor manufacturing and semiconductor technology development facilities, machinery and equipment, land for these facilities, directly related personal property, and directly related support facilities and office buildings. It further includes repairs, replacements, modernization, renovations and remodeling of existing buildings, structures, machinery and equipment, fixtures and furnishings, and supplies as well as future additions to such buildings or structures. The Project will be located on land zoned and planned, at the time of development, to allow semiconductor manufacturing, technology development, and related structures as a permitted



use within the City, as well as, but not limited to, such land at Intel's existing Aloha and Ronler Acre campuses. The Project shall consist of a maximum of \$100 billion in investment or investments. An investment under the Project will be a semiconductor manufacturing or semiconductor technology development investment, or both, in furtherance of the Project as defined by Intel and communicated in advance to the County and the City (an "Investment"). Each Investment is a separate "eligible project" as that term is used in ORS 285C.600(2). The approximate dollar amount and scope of an Investment under the Project must be defined with enough specificity that the Investment may be differentiated from expenditures under Prior SIPs or prior Investments under this 2014 SIP Agreement and with enough specificity that the County and the City may determine the timing and scope of the Investment so as to properly apply the SIP property tax partial exemption to each Investment. Each Investment definition will be reviewed and approved by the County. This review and approval will be limited to determining whether the Investment conforms to this Agreement and the definition is adequate for proper administration of the SIP as provided in this paragraph. There may be one or several Investments during the term of this 2014 SIP Agreement, which term shall be a period of thirty (30) years from the execution of this 2014 SIP Agreement by all parties, unless terminated earlier pursuant to Section 13. The first such Investment shall commence prior to the tenth (10<sup>th</sup>) anniversary of the execution of this 2014 SIP Agreement.

1.2 In the event that Intel establishes a dollar amount for an Investment in the definition of an Investment and upon completion of the Investment the actual capital expenditures for that Investment are less than the definition amount, Intel may allocate the unspent dollar amount to a future Investment by giving notice to that effect to the County. The Project will not include:

- a. an “existing project,” defined as property previously owned or leased by Intel at any location prior to commencement of the Project, or any property within or comprising a previously approved SIP project that received a prior SIP property tax partial exemption. However, repairs, replacements, modernization, renovations, and remodeling of existing buildings, structures, machinery and equipment, fixtures and furnishings, as well as future additions to buildings or structures, all as provided in OAR 123-623-1700, to that property are permitted to be in the Project, provided they are directly related to semiconductor manufacturing and semiconductor technology development;
- b. any investment outside of the geographic confines described above;
- c. any structures in addition to those described in the Project definition;
- d. any expenditure deemed not to constitute a component of an “eligible project” pursuant to the administrative rules of the OBDD; and
- e. property other than that which directly relates to semiconductor manufacturing and semiconductor technology development (*e.g.*, the Project does not include investment in a new business group, Internet development, product marketing, etc).

2. **SIP Partial Exemption Period.** Each Investment will be eligible for the 15-year partial tax exemption allowed pursuant to ORS 285C.606(1) and ORS 307.123 and the

administrative rules adopted thereunder. Each Investment will be fully taxed on the first \$100 million of real market value within the Investment (increased annually for growth at the rate of three percent) pursuant to ORS 307.123(1). Each Investment will be subject to the obligation to pay the Community Service Fee (“CSF”) pursuant to ORS 285C.609(4)(b). The period of the partial tax exemption for each Investment shall, pursuant to ORS 307.123(1)(b) commence on the earlier of: (i) the date that the Investment is certified for occupancy or, if no certificate of occupancy is issued, the date the Investment is used to produce a product for sale; or (ii) the expiration of the exemption for commercial facilities under construction under ORS 307.330. The partial tax exemption for each Investment shall have a duration of fifteen (15) years, except that if an Investment commences during the last fifteen (15) years of the thirty (30) year term of this 2014 SIP Agreement that Investment shall continue to receive the partial tax abatement and shall continue to be obligated to pay any taxes, fees, or other payments required under this 2014 SIP Agreement only until the end of the thirty (30) year term of this 2014 SIP Agreement.

**3. Allocation among SIPs.** Intel shall be responsible for informing the County whether eligible expenditures should be allocated to the tax accounts for the 2005 SIP or this 2014 SIP Agreement. Once the 2005 SIP has reached its project spending limit or time limitation, all eligible expenditures by Intel thereafter shall be allocated to this 2014 SIP Agreement. The County shall comply unless directed otherwise by the Department of Revenue. The intent of the parties is to permit Intel to maximize the tax advantages provided for by each SIP, but Intel is solely responsible for its allocation decisions. To the extent practicable, the County shall inform Intel if Intel has failed to properly allocate expenditures or the County is unsure of Intel’s allocation. The default allocation shall be to

the 2005 SIP unless Intel directs otherwise in writing within thirty (30) days of the notice from the County. Intel agrees that capital expenditures included in an Investment, including the costs of any individual new building or reconstructed building commenced during the period in which the 2005 SIP and this 2014 SIP overlap, shall be allocated to one SIP only and not be divided between or allocated in part to both the 2005 SIP and the 2014 SIP. Further, Intel agrees that a capital expenditure for a land purchase, a building, or an item of equipment or process support system shall be allocated to only one Investment and not allocated between Investments. It is understood by the parties that an allocation may be subject to review and approval of the Oregon Department of Revenue (“DOR”) and that County has no control over decisions of the DOR regarding tax exemptions and related matters.

**4. Conditions Precedent.** The following are conditions precedent to the obligations set forth herein:

4.1 The City’s approval of this 2014 SIP Agreement.

4.2 A determination by the OBDD, or its designee, that the Project and each Investment as defined herein are eligible for the tax exemption provided in ORS 285C.606, ORS 307.123, and OBDD Administrative Rules.

**5. Intel Obligations.**

5.1 Guaranteed Annual Payment (“GAP”). After Intel first receives a SIP property tax exemption pursuant to this Agreement, Intel shall pay to the County the sum of \$2,870,000 on December 1 of each year starting December 1, 2025 and continuing thereafter until December 1, 2044 or the date this 2014 SIP Agreement terminates under Section 13, whichever is earlier, subject to the

following. If this 2014 SIP Agreement terminates in 2044 before December 1, 2044, due to the 30<sup>th</sup> anniversary of this 2014 SIP Agreement occurring earlier in 2044, the GAP payment due in 2044 is due within thirty (30) days prior to that 30<sup>th</sup> anniversary. If this 2014 SIP Agreement terminates as provided in Section 13.2, Intel's obligation to make GAP payments stops. GAP shall be prorated for the period December 1 to November 30 to the date of termination of this Agreement. GAP is due and payable without regard to investment levels or other circumstances once Intel first receives a SIP property tax exemption under this 2014 SIP Agreement. GAP is in addition to, and not in lieu of, any taxes or fees paid by Intel, nor is it a credit against any taxes or fees.

5.2 Ad Valorem Property Taxes. Unless Oregon law provides otherwise, the first \$100 million in real market value for each Investment, increased annually for growth at the rate of three percent (3%), shall be taxable at its assessed value as provided by law. The real market value of the Investment in excess of the amount of real market value referred to in the preceding sentence shall be exempt from ad valorem taxation as provided by State law and rules. For each Investment, the above described ad valorem taxes payable by Intel shall be the "Investment's Taxes Payable."

5.3 Community Service Fee (CSF). Each year that Intel receives a SIP property tax partial exemption for a given Investment under the Project, Intel shall pay to County a CSF for that Investment, as provided by ORS 285C.609 (4) (b) (B), equal to twenty-five percent (25%) of the property taxes exempted in each tax year on each Investment, but not exceeding \$2 million in any one year for each



Investment. On or about Nov. 15, County shall provide Intel with a statement describing its calculations and the amount due and Intel shall pay within thirty (30) days thereafter. Intel may challenge the determination as provided in Section 8.

5.4 Fee in Lieu of Property Taxes. Each tax year that Intel receives a SIP property tax exemption for a given Investment under the Project, Intel shall pay to the County a fee on the assessed value of any Land and Buildings (as defined below), included in that Investment based on the formula set forth below as of July 1. On or about November 15, County shall provide Intel with a statement of the amount due and Intel shall pay no later than thirty (30) days thereafter. This fee shall be for each Investment. It shall be determined each year as follows:

$$\begin{array}{rcl}
 \text{Fee In Lieu} & = & (\text{Investment's Taxes} \\
 \text{for an Investment} & & \text{Payable for an Investment}) \\
 & & \text{Plus: Investment's CSF} \\
 & & \text{Multiplied by: (Total of all} \\
 & & \text{Investments' cumulative} \\
 & & \text{expenditures under the 2014} \\
 & & \text{SIP Agreement)} \\
 & \div & \\
 & & \$100 \text{ Billion}
 \end{array}$$

The following is an example for illustration of the above formula:

1. For the year in question, assume:

$$\begin{array}{rcl}
 \text{Investment's Taxes Payable} & = & \$2,000,000 \\
 \text{(Based on taxable \$100M)} & & \\
 \\
 \text{Investment's CSF} & = & \$2,000,000 \\
 \\
 \text{Total of all Investments' cumulative expenditures} & = & \$6,000,000,000
 \end{array}$$

$$2. \text{ Fee In Lieu} = \$2,000,000$$

$$\begin{array}{rcl}
 & + & \frac{\$2,000,000}{\$4,000,000} \\
 \text{Multiplied by} & & \$6,000,000,000 \div \\
 & & \$100,000,000,000 = .06 \\
 = & & \$240,000
 \end{array}$$

In no event, however, shall this fee be less than the amount of property taxes that would have been due on any Land or Buildings within that Investment assuming no SIP partial tax exemption (*i.e.*, the assessed value of any Land and Buildings in the Investment times the total tax rate for the subject year). Land and Buildings eligible for the construction in progress tax exemption pursuant to ORS 307.330 shall not be included for purposes of determining the minimum fee in lieu or formulaic fee in lieu under this paragraph.

It is understood by the parties that, in general terms:

- a. "Land" includes land acquired by Intel after execution of this 2014 SIP Agreement and any excavation or grading, storm sewers, sanitary sewers, water and gas plumbing, and electric lines;
- b. "Buildings" include footprint excavation, foundation, frame, wall, roof, utilities, all interior building finish, site improvements (paving, lighting, and landscaping), and indirect costs. Utilities that support the building environment, such as HVAC for building comfort, are not process support for manufacturing and research processes. "Buildings" does not

include any Machinery and Equipment used in the manufacturing or research activities occurring in the Buildings, including but not limited to: electrical systems, air and gas handling systems, HVAC and similar systems that control heat and humidity, water and wastewater systems, and other systems necessary for the manufacturing and research processes;

- c. “Machinery and Equipment” includes all manufacturing and process tools, all process support equipment and all foundations, plumbing, electrical, freight, and installation costs for such items.
- d. “Personal Property” includes all office and production area furniture, fixtures, desktop portable tools and equipment, plus non-licensed wheel vehicles and trailers.

Intel shall file all property tax returns required by law, listing all property in each Investment in the same manner as if no SIP tax exemption applied. Cumulative expenditures for the Investment are the total cost of all property as listed (including, for example, property for an exemption) subject to the right of the County or DOR to correct any under-valuation, omitted property or other reporting errors. The cost shall be summarized by year and separated between Land, Buildings, Machinery and Equipment and Personal Property consistent with the definitions in this Section and, to the extent not inconsistent, the

Memorandum of Understanding referenced in Section 16 of this Agreement. In the event of any conflict between this Agreement and the MOU referenced in Section 16, this Agreement controls.

In the event that any statutes, administrative rules or court decisions regarding classification of property or otherwise applicable to the implementation of the provisions of this Section 5.4 are changed after the effective date of this Agreement, the parties will seek to have DOR apply the provisions of this Section 5.4 notwithstanding such changes. Should the DOR be unable or unwilling to apply the terms of this Section 5.4 in light of such changes, however, then the changes shall control in the event of a conflict.

County will provide Intel with a statement describing its calculations and the amount due. Intel may challenge the County's determination as provided in Section 8. The parties will cooperate reasonably and in good faith to provide all necessary documentation and take such steps as are necessary to calculate this fee.

5.5 First Source Agreement. Intel shall enter into a first source hiring agreement with an appropriate third party acceptable to the County in substantially the form currently in place for the 2005 SIP. Washington County is to be designated a third party beneficiary of the agreement and is entitled to enforce its terms. The parties may designate a different provider for this service by letter agreement.

5.6 Charitable Fee. As consideration for the County agreeing to enter into this Agreement in advance of Project commencement by Intel, Intel will pay \$100,000.00 annually for six (6) consecutive years, commencing on the execution date of this 2014 SIP Agreement and each July 1 thereafter. This obligation applies regardless of whether Intel receives a SIP property tax exemption under this 2014 SIP Agreement for any of those years. These funds shall be earmarked for public or private non-profit organizations fulfilling a public purpose in Washington County. The County Administrator shall select the eligible recipient(s) subject to Intel's prior approval for consistency with Intel's Code of Conduct and any other applicable policies.

5.7 SIP Application. Intel is responsible for filing an application with the State of Oregon as provided in ORS 285C.612 and the applicable administrative rules. Intel shall file the application within sixty (60) days of execution of this 2014 SIP Agreement.

**6. County Obligations.**

6.1 Within fifteen (15) days of the County's approval of this 2014 SIP Agreement, the County shall request that the OBDD determine that the Land, Buildings, Machinery and Equipment and Personal Property constituting the Project, and each constituent Investment as determined and subject to the terms herein, be granted a partial exemption from ad valorem property taxation for a period of 15 years for each Investment as provided in ORS 307.123, beginning on:

- The date the Investment is certified for occupancy or, if no certificate of occupancy is issued, the date the property is used to produce a product for sale; or
- The expiration of the exemption for commercial facilities under construction under ORS 307.330.

Provided, however, that no Investment shall be eligible for partial tax exemption on or after the date that is thirty (30) years from the date this 2014 SIP Agreement is executed.

6.2 County shall be solely responsible for payment of any CSF due the City or any other jurisdiction.

## **7. Joint Obligations.**

In addition to the other obligations set forth in this Agreement, the parties shall:

7.1. Cooperate with the City, the OBDD, and the DOR to secure approval of the SIP and take such steps as may, from time to time, be necessary to maintain the partial property tax exemption.

7.2 Provide such information and resources to each other as may be reasonably necessary to ensure proper calculation of the amounts due under this 2014 SIP Agreement.

7.3 The parties agree to develop a Memorandum of Understanding to document how the parties can address infrastructure impacts associated with the expenditures contemplated under this 2014 SIP Agreement, including seeking federal, state, and local funding for such infrastructure needs, as appropriate. Nothing in this



provision authorizes the parties to agree to terms that modify, contract, or expand the Project, or any terms that would be inconsistent with this 2014 SIP Agreement.

**8. Remedies of Intel.**

8.1 Intel may challenge the County's calculation of any payment amount due to the County pursuant to this 2014 SIP Agreement by filing a written objection on or before the due date for the payment. The objection shall be accompanied by payment in full of the amount claimed by the County to be due and a statement of the basis for the challenge. The County shall deposit the amount in a trust and agency account and shall have fifteen (15) days to review the objection and issue a determination, together with any refund it concludes is required. Failure of the County to respond shall be deemed a denial. This process shall be a prerequisite to Intel exercising any other remedies for contesting the amount due to the County.

8.2 Intel may institute proceedings in the Circuit Court for Washington County, the Oregon Tax Court, or Federal District Court for Oregon, as appropriate, to challenge any amounts due claimed by the County or to seek specific performance of this 2014 SIP Agreement in the event of breach by the County. In the event that the Court determines that a refund is due Intel, the County shall pay the amount due, together with interest at the rate actually earned by the County during the interim.

8.3 Nothing herein shall limit or restrict Intel from challenging its assessed valuation or amount due for ad valorem property taxes in the same manner as any other taxpayer.

8.4 Intel shall not be required to pay any of the fees set forth herein with respect to an Investment for any year that it has paid ad valorem property taxes on the full assessed value of the Investment within the Project due to cancellation or disqualification of the SIP property tax exemption.

**9. Remedies of County.**

9.1 Late Payment of Any Fee. Failure of Intel to make payment in full of any amount due under this 2014 SIP Agreement by the due date shall result in penalty and interest being charged on the past due balance in the same amount as is provided by law for late payment of ad valorem property taxes.

9.2 Failure to Pay the Community Service Fee. The parties acknowledge that payment of the CSF is a statutory prerequisite to approval of a partial property tax exemption. If Intel fails to pay the CSF for an Investment by the end of the tax year in which it is due, the tax exemption may be revoked as to that Investment as provided in ORS 307.123(6), and the property within that Investment will be fully taxable for the following year and for each subsequent tax year for which the fee remains unpaid. If an unpaid CSF is paid after the exemption is revoked, the property will again be eligible for the partial property tax exemption, beginning with the tax year after the payment is made. Loss of a partial tax exemption for an Investment due to Intel's failure to pay the CSF does not relieve Intel of its obligation to make GAP payments. The failure by Intel to make a payment of the CSF due with respect to an Investment does not cause the termination of this 2014 SIP Agreement under Section 13.

9.3 Failure to Pay Any Other Fee. The County may declare a default if any other fee remains unpaid by the end of the tax year in which the fee is due. Intel shall

have thirty (30) days to cure the default or provide its reasons why it is not in default. The County shall have thirty (30) days to review the information and notify Intel of its final determination. Intel may appeal an adverse final determination by filing an action in the Washington County Circuit Court, the Oregon Tax Court, or the Federal District Court for Oregon, as appropriate, within sixty (60) days of the notice. Intel must pay to County the full amount in dispute before filing a challenge. County shall refund the amount, with interest at the rate actually earned by the County, if the court finds in favor of Intel. If Intel fails to pay the amount determined by the County to be due, the County may file an action to collect the entire amount of the unpaid fee, with penalties and interest as provided by law for taxes or as otherwise permitted by law. The failure to pay any other fee with respect to an Investment does not cause the termination of this 2014 SIP Agreement pursuant to Section 13.

9.4 Board Discretion. The Board of Commissioners may, in its sole discretion, waive any contractual remedy, other than the remedy for failure to pay the CSF, if it finds that Intel has made a reasonable effort to comply but has been precluded from complying for reasons beyond its immediate control.

**10. Ad Valorem Property Taxes.** Except as provided otherwise, nothing herein shall govern the manner of and process for assessment, payment, or collection of ad valorem real property taxes on the first \$100 million of real market value of each Investment included in the Project, increased annually for growth at the rate of 3 percent (3%) or on property outside the definition of the Project.

**11. Documentation.** Intel shall have the burden of documenting compliance with this 2014 SIP Agreement. Intel shall provide County such documentation or information as County requires verifying compliance.

**12. Tax Limitations.** The parties acknowledge that the fee payments negotiated herein are authorized by law as requirements relating to the Project, do not constitute property taxes and are not subject to the limits under Section 11 or 11b, Article XI of the Oregon Constitution. Any increase in amounts paid resulting from a change in property values shall not be considered a change in tax or tax rate. Intel waives any claim, known or unknown, that these property tax limitations, or their implementing statutes, apply to the fees set forth in this 2014 SIP Agreement.

**13. Termination.** This 2014 SIP Agreement shall commence on the date of execution and shall terminate on the earlier of:

13.1 The thirtieth (30<sup>th</sup>) anniversary of the mutual execution of this 2014 SIP Agreement, or

13.2 The date when the partial tax exemption under Section 2 on the Project ends and the cumulative total of all Investment or Investments made under this 2014 SIP Agreement on the Project equals \$100 billion.

**14. Miscellaneous Provisions.**

14.1 The laws of the State of Oregon shall govern this 2014 SIP Agreement. Any action or suit commenced in connection with this contract shall be in the Circuit Court of Washington County, Oregon Tax Court, or the Federal District Court for Oregon, as appropriate.

14.2 No person shall be denied or subjected to discrimination in receipt of the benefits of any services or activities made possible by or resulting from this 2014 SIP Agreement on the grounds of race, color, religion, gender, sexual orientation, national origin, disability, age, or marital status.

14.3 The terms herein shall be given their normal and customary meaning, except that terms relating to the payment of property taxes and fees in lieu of taxes shall be construed consistently with the tax laws and rules of the State of Oregon. No provision shall be construed against a party on the basis that the party drafted the provision.

14.4 The City is a signatory of this 2014 SIP Agreement as relates to any portion of the Project within the City; provided, however, that nothing herein gives the City any claim or right to the proceeds of this 2014 SIP Agreement except as provided by law. Distribution of the proceeds shall be governed by a separate agreement between the County and the City. Nothing in this 2014 SIP Agreement is intended to give, or shall be construed to give or provide any benefit or right, whether directly, indirectly, or otherwise, to third persons unless such third persons are individually identified by name herein and expressly described as intended beneficiaries of the terms of this 2014 SIP Agreement.

14.5 Time is of the essence for this 2014 SIP Agreement. The failure of either party to enforce any provisions of this 2014 SIP Agreement shall not constitute a waiver by that party of that or any other provision.

14.6 The terms, conditions, representations, and all warranties contained in this 2014 SIP Agreement shall survive the termination or expiration of this 2014 SIP Agreement.

14.7 This 2014 SIP Agreement shall bind the successors and assigns of the parties. In the event of a purchase, merger, or other restructuring, including but not limited to a divestiture of the Washington County based semi-conductor manufacturing and semi-conductor technology components of Intel, whether voluntary or not, Intel shall make every effort to ensure that the obligations set forth herein are not impaired. The County shall cooperate and assist Intel in fulfilling this obligation.

**15. Change of Law.** To the extent permitted by law, changes in statutes or DOR or OBDD administrative rules enacted after the date of this 2014 SIP Agreement shall not affect the terms of this 2014 SIP Agreement. Nothing in this provision, however, obligates the County or the City to contest or refuse to comply with a change that the County or the City deem, in their sole discretion, to be mandatory or otherwise govern.

**16. Memorandum of Understanding.** The parties and the DOR have developed a Memorandum of Understanding under the 2005 SIP to address administration of the SIP, including but not limited to:

16.1 Definitional details relating to what property qualifies as directly related personal property and directly related support facilities and office buildings.

16.2 Proper categorization of mixed-use facilities.

16.3 Reporting requirements.

16.4 Valuation methodology for buildings.



The parties agree to work with the DOR to review and, where appropriate, amend that Memorandum of Understanding so as to properly implement this 2014 SIP Agreement. Nothing in this provision authorizes the parties to agree to terms that modify, contract, or expand the definition of the Project, or any terms that would be inconsistent with this 2014 SIP Agreement.

**17. Waiver and Hold Harmless.**

17.1 Except as provided in Section 8, Intel hereby **WAIVES and RELINQUISHES** any claim, right, title or interest in any ad valorem property tax payments made under Section 5.2 of this Agreement and shall not be entitled to any refund of said payments, in the event that the DOR or a court of competent jurisdiction determines that the levy of ad valorem property taxes on any property in accordance with this 2014 SIP Agreement is inconsistent with or not authorized by Oregon law.

17.2 Intel shall hold harmless, indemnify and defend the County and the City, their respective officers, employees and agents for and against any and all claims arising out of any approval of an ad valorem property tax partial exemption provided in accordance with this 2014 SIP Agreement in the event that the exemption is deemed by a court of competent jurisdiction to be inconsistent with or not authorized by Oregon law, upon final resolution, including any appeal or petition of such litigation. The County shall not be obligated to contest any such determination but shall not object to, and shall reasonably cooperate with, any such contest by Intel.

17.3 Nothing in the foregoing paragraphs 17.1 and 17.2, is intended to limit Intel's remedies set forth in Section 8, other than the right to challenge the levy of ad valorem taxes or to a refund of ad valorem taxes as provided in Paragraph 17.1 and 17.2, respectively.

**18. Severability.** If any clause or provision of this 2014 SIP Agreement is held to be invalid or unenforceable, the parties intend that the remainder of this 2014 SIP Agreement shall not be affected. It is the intent of the parties that, in the event a clause or provision is stricken, that there be added as part of this 2014 SIP Agreement a clause or provision as similar in terms as may be possible, legal, and enforceable so as to provide a comparable partial property tax exemption and comparable payments to the County as provided for in this 2014 SIP Agreement.

**19. Merger.** THIS 2014 SIP AGREEMENT CONSTITUTES THE COMPLETE AND EXCLUSIVE STATEMENT OF THE 2014 SIP AGREEMENT AMONG THE PARTIES AS REGARDS THE PROJECT AND SUPERSEDES ALL PRIOR AGREEMENTS OR PROPOSALS, ORAL OR WRITTEN, AND ALL OTHER COMMUNICATION BETWEEN THE PARTIES RELATING TO THE SUBJECT MATTER OF THIS 2014 SIP AGREEMENT. NO WAIVER, CONSENT, MODIFICATION, OR CHANGE OF TERMS OF THIS 2014 SIP AGREEMENT WILL BE BINDING ON ANY PARTY EXCEPT AS A WRITTEN ADDENDUM SIGNED BY AUTHORIZED AGENTS OF THE PARTIES. THIS 2014 SIP AGREEMENT, HOWEVER, IN NO WAY SUPERCEDES OR MODIFIES THE SIP AGREEMENTS ENTERED INTO BY THE PARTIES IN 1994, 1999 AND 2005.

**INTEL CORPORATION**

By: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Date: \_\_\_\_\_

**CITY OF HILLSBORO**

By: \_\_\_\_\_  
\_\_\_\_\_  
Mayor

Date: \_\_\_\_\_

**WASHINGTON COUNTY**

By: \_\_\_\_\_  
\_\_\_\_\_  
Chairman  
Board of County Commissioners

Date: \_\_\_\_\_

APPROVED AS TO FORM:

By: \_\_\_\_\_  
Alan Rappleyea  
County Counsel

# TECH TOWN PORTLAND

WHAT IS TECHTOWN    TECH DIVERSITY  
ABOUT PORTLAND    JOBS    INTERNSHIPS  
SPONSORS

LEARN MORE ABOUT THE PLEDGE >

## PORTLAND TECH DIVERSITY PLEDGE

Portland's technology community has much to celebrate; however, when it comes to having an inclusive and diverse industry we must improve. Diversifying our workforce to include all from our community is the right thing to do, and the data shows it benefits us in terms of innovation, team functioning, and bottom line results.

The undersigned believe it is necessary to do more than just talk about the need for a more diverse tech sector. We believe collective action and accountability are required to address the underrepresentation of women and people of color in our industry. Given our industry's history of tackling profound challenges, we believe we must tackle this challenge, too. Therefore, each of us has agreed to cultivate cultures of inclusion and create a plan for increasing diversity in our organizations. The actions being taken by pledging companies are:

1. **Partner with groups in Portland that can assist** with hiring and career advancement for underrepresented communities;
2. **Create and implement strategies to increase hiring** of women and people of color, from intern programs to full-time positions at all levels within our organizations;
3. **Educate staff on unconscious workplace biases** and implement specific actions designed to alleviate them;
4. **Provide internal development and progression programs**, and ensure underrepresented employees can access these programs; and
5. **Share our collective data** on the demographic representation within our offices in the Portland metro area of gender and race.

We will create community benchmarks and release our progress in an annual report. Our baseline information is available at [TechtownPortland.com/diversity](http://techtownportland.com/diversity). To achieve these actions we are partnering with the Portland Development Commission, the City of Portland, and **Worksystems**, Inc. Through this partnership, we will develop tools to foster an increasingly diverse and inclusive workforce. The coalition of companies listed below is just a start, and we invite you to join us. To join click the "[Take the Pledge](#)" button on our site.

If we are successful, our efforts will create a needed pool of talent for our industry and establish Portland as a place where everyone can have a fruitful career in technology. We have a long road ahead, but we are proud to be united to foster a more equitable and prosperous Portland.

Respectfully,

**Mat Ellis**

Founder & CEO

[Cloudability](#)

**Gino Zahnd**

Co-Founder & CEO

[Cozy](#)

**Sam Blackman**

CEO & Co-Founder

[Elemental](#)

[Technologies](#)

**Justin Yuen**

President

**Vince LaVecchia**

Founder & COO

**Matt Jones**

Head of Future

**FMYI**

**Instrument**

**Infotainment**

- Senior Technical  
Specialist

**Jaguar Land Rover**

**Eric Winquist**

CEO & Co-Founder

**Jama Software**

**James McDermott**

Founder & CEO

**Lytics**

**Joaquin Lippincott**

President &

Founder

**Metal Toad**

**Luke Kanies**

CEO/Founder

**Puppet Labs**

**Josh Reich**

CEO

**Simple**

**Marcelino Alvarez**

Founder & CEO

**Uncorked Studios**

**Monica Enand**

Founder & CEO

**Zapproved**

**Patrick Quinton**

Executive Director

**Portland**

**Development**

**Commission**

**Skip Newberry**

President

**Technology**

**Association of**

**Oregon**

**John Gardner**

Director of

Business Services

**Worksystems**

THESE COMPANIES ARE ALSO TAKING  
THE PLEDGE:

**Ryan Buchanan**, CEO, **eROI**

**Armon Moore**, Chief Creative Officer &  
Co-Founder, **ImpactFlow**

**Jessica Mah**, Co-Founder & CEO,  
**inDinero**

**Steve McElfresh**, VP of People  
Operations, **New Relic**

**Don Spear**, President & CEO,  
**OpenSesame**

**Robby Russell**, Managing Partner, **Planet Argon**

THESE ORGANIZATIONS ARE ALSO  
TAKING THE PLEDGE:

**Mitchell Robertson**, VP, Business  
Partnerships & Development, **Code  
Fellows**

**Michael Kaiser-Nyman**,  
President, **Epicodus**

**Nitin Rai**, President, **The Indus  
Experiment**



**Jonathan Evans**, CEO & Founder, **Skyward**

**Lev Tsylin**, President & CEO, **ThinkShout**

**Ryan Carson**, CEO, **Treehouse**

THANK YOU TO THE FOLLOWING COMPANIES/ORGANIZATIONS FOR TAKING THE  
PORTLAND TECH DIVERSITY PLEDGE.

ARE YOU **READY TO TAKE THE PLEDGE?**



CONNECT WITH US:



BROUGHT TO  
YOU BY:

**PDC** | PORTLAND  
DEVELOPMENT  
COMMISSION  
[www.pdc.us](http://www.pdc.us)



**Request for Application**  
**Emerging Regional STEM Hub – Backbone Grant**  
**2015-2017**

**Updated to: Grant Application Due Date: 2:00pm on January 19, 2016**

**Oregon Department of Education**  
**Office of Learning**  
**255 Capitol Street NE**  
**Salem, OR 97310-0203**

It is the policy of the State Board of Education and a priority of the Oregon Department of Education that there will be no discrimination or harassment on the grounds of race, color, sex, marital status, religion, national origin, sexual orientation, age or disability in any educational programs, activities, or employment. Persons having questions about equal opportunity and nondiscrimination should contact the Oregon Department of Education, 255 Capitol Street NE, Salem, OR 97310; Telephone (503) 947-5600; Fax (503) 378-5156.

## Table of Contents

I.	Background and Legislative Intent.....	1-3
II.	General Information.....	4-7
A.	Purpose.....	4
B.	Type of Grant.....	4-5
C.	Eligibility.....	5
D.	Grant Requirements.....	5
E.	Use of Funds.....	5-6
F.	Reporting and Assurances.....	6
G.	Scoring and Appeals Process.....	7
III.	Application Process.....	8-10
A.	Timeline and Important Dates.....	8
B.	Required Application Section.....	9
C.	Format and Application Instructions for Submission.....	9-10
IV.	Application Narrative .....	11-13
V.	Appendix .....	14-30
	Appendix A: Definitions.....	14-16
	Appendix B: Required Documentation – List and Forms.....	17-19
	Appendix C: Sample Budget Worksheet and Matching Funds Map .....	20-21
	Appendix D: Roles of STEM Hub Backbone.....	22-23
	Appendix E: Scoring Rubric.....	24-30

## **Emerging Regional STEM Hubs – Backbone Grant Request for Applications**

### **I. Background and Legislative Intent**

In 2013, Oregon’s network of Regional STEM Hubs was created as part of HB3232—a Strategic Initiative to strengthen the connection between education and the world of work. This foundational investment supported the establishment of six STEM Hubs in diverse communities across the State. Overseen by a partnership between the Oregon Department of Education, the Chief Education Office, and the STEM Investment Council, the overarching purpose of this investment strategy is to increase student interest, preparation, and attainment in science, technology, engineering, and mathematics for success in related degrees and careers.

These regionally-focused, multi-sector partnerships unite schools, institutions of higher education, non-profits, businesses, civic leaders and communities to drive local STEM innovation and improvements at the systems-level, while also working to identify systemic barriers and co-construct solutions with communities most affected by the barriers. The focus of the STEM Hubs is to improve the entire STEM education ecosystem—formal and non-formal environments—from birth to career. They are not solely focused on K-12, though improving K-12 educational experiences in STEM are an essential expectation of each Hub. STEM Hubs leverage local resources and opportunities to bring STEM to students early and often, engaging them in and beyond the classroom. Hub borders are fluid, overlapping into surrounding communities and connected by multiple professional networks through which ideas and resources flow.

The Theory of Action for the Regional STEM Hub strategy is based upon [a collective impact model](#) where partnerships engage with multiple sectors in the community; eliminate locally defined inequities; use data for continuous improvement; and leverage community assets in efforts to improve practice and increase opportunities related to STEM education. Hubs align partner efforts and programs towards a common agenda with a commitment to using relevant data for continuous improvement.

Coordinating and facilitating a partnership with leaders from different sectors is extremely challenging. It requires high-level champions in the community who understand how critical these efforts are to their community, and who are willing to commit their time and resources alongside others to break barriers and achieve the outcomes. Hubs are not, primarily, intended to deliver programming directly; rather, the collective partners identify the essential programming needed to achieve the goals of the partnership, then identify how best to provide those services. In some instances that programming expertise can be found locally, and in other instances Hubs may identify external providers to address the local needs.

Often, a neutral, and respected organization is selected by the partnership to be the primary “backbone” of the STEM Hub, and to support day to day convening and coordination. However, no single organization can usually fill all of the roles needed for a successful

partnership, and the backbone organization is not intended to staff all positions to meet all of the needs of the partnership. Roles are usually shared across the core partners in the STEM Hub based on expertise and capacity. For example, one of the partner institutions might have communications expertise and a commit to handling the development of marketing materials and maintaining the web presence. Another partner organization may have capacity and expertise to be the lead on data and metrics. Please see Appendix D for a detailed description of the multiple roles of a STEM Hub backbone.

Some of the programmatic strategies that are common amongst partners across the Regional STEM Hubs include:

- educator professional development around best practices in STEM instruction,
- implementation of the Next Generation Science Standards and the Common Core,
- increasing hands-on STEM learning experiences for students both in- and out- of school, and
- deepening student and educator connections to the fast-growing STEM employment opportunities in the state of Oregon.
- leveraging volunteers from local STEM employers to provide internship and other career-related learning experiences for students, and to support educator professional learning to bring real-world application of content.

Local STEM employers provide internship and other career-related learning experiences for students and work alongside formal and informal educators to bring real-world contexts to enrich and deepen content understanding and its application.

Regional STEM Hubs form a mutually supportive statewide network of hubs for implementation and dissemination of best practices. Through HB 3072, the 2015 Oregon Legislature, in collaboration with the Governor's office and the STEM Investment Council, provided continued monetary support to increase organizational capacity for this work. The intent is for all communities to have access to a STEM Hub in Oregon and to build an ecosystem to reach each and every student and educator.

All current and future Regional STEM Hub Grant sites are expected to incorporate and adopt the principles of Oregon's [Equity Lens](#). Through this Equity Lens, the Oregon Department of Education considers the creation of strategic opportunities for educational equity and excellence for every child and learner in Oregon. The Equity Lens provides twelve core beliefs that fuel opportunities to bolster success for diverse student populations across the state. The beliefs most pertinent to the work of this grant are highlighted below:

- **We believe** that everyone has the ability to learn and that we have an ethical and moral responsibility to ensure an education system that provides optimal learning environments that lead students to be prepared for their individual futures.
- **We believe** that our community colleges and university systems have a critical role in serving our diverse populations, rural communities, English language learners and



students with disabilities. Our institutions of higher education, and the P-20 system, will truly offer the best educational experience when their campus faculty, staff and students reflect this state, its growing diversity and the ability for all of these populations to be educationally successful and ultimately employed.

- **We believe** that the students who have previously been described as “at risk,” “underperforming,” “under-represented,” or minority actually represent Oregon’s best opportunity to improve overall educational outcomes. We have many counties in rural and urban communities that already have populations of color that make up the majority. Our ability to meet the needs of this increasingly diverse population is a critical strategy for us to successfully reach our 40/40/20 goal.
- **We believe** that resource allocation demonstrates our priorities and our values and that we demonstrate our priorities and our commitment to rural communities, communities of color, English language learners, and out of school youth in the ways we allocate resources and make educational investments.
- **We believe** that communities, parents, teachers, and community-based organizations have unique and important solutions to improving outcomes for our students and educational systems. Our work will only be successful if we are able to truly partner with the community, engage with respect, authentically listen—and have the courage to share decision making, control, and resources.

## II. General Information

### A. Purpose of the Emerging Regional STEM Hub Backbone Grant

The Emerging Regional STEM Hub Backbone Grant of 2015-2017 is intended to develop and expand collaborative efforts that leverage community assets in order to increase students' proficiency, interest, and attainment of post-secondary credentials and degrees in STEM and CTE. These regional collaborations will be a catalyst to drive economic vitality for individuals, communities, and the State. This grant supports the "backbone" coordination, data, and communication efforts of emerging Regional STEM Hubs. The purpose of funding the Emerging STEM Hub Backbone is to provide initial funding to develop a local framework of sustainable partnerships and to create a formalized [Partnership Plan](#).

To support the success of this initiative, the Oregon Regional STEM Hubs will be connected through a larger statewide STEM network that will provide mutual support across regions to:

- a) improve student performance in STEM related content,
- b) increase interest and improve preparation for STEM careers, and
- c) increase proficiency in STEM concepts necessary to make personal and societal decisions.

Across these focus areas, we prioritize efforts that:

- a) close the opportunity gaps for culturally and linguistically diverse learners and learners navigating poverty;
- b) connect with local economic and workforce needs;
- c) and increase high school and post-secondary graduation and attainment.

### B. Type of Grant

Based on the availability of state resources this grant begins February 2, 2016 and ends on June 30, 2017. The Oregon Department of Education, in collaboration with the office of the Chief Education Office, will review progress reports and performance data to determine future and continued program funding.

Between \$75,000-\$125,000 will be available per application for the entirety of the grant period. Grants will be determined based on detailed information submitted in the application, appropriate backbone functionality identified in budget worksheet and narrative, differential needs across regions, developmental status of the partnerships and availability of state funding.

Initial release of funding will be no more than 50 percent of the full grant request. Awardees will have up to 12 months to complete a comprehensive Partnership Plan based on extensive engagement with community partners. Once approved by the Oregon Department of Education in collaboration with the Chief Education Office, the remainder of the approved backbone funding will be released, and Hubs will also become eligible to apply for STEM Hub program funding.

Under certain circumstances and with prior notification, ODE may approve use of grant funds between June 30, 2017 and September 30, 2017. Grant funds may not be used outside of the award period February 2, 2016 – June 30, 2017 without prior approval.

### **C. Eligibility**

**The Regional STEM Hub Grant is a competitive grant.** Any public school district, Education Service District (ESD), public charter school, community college or university or combination of such entities is eligible to apply. Other Oregon entities may partner with an eligible entity for the proposed project however; the eligible entity must retain accountability and fiscal responsibility for the implementation of the proposed activities.

### **D. Grant Requirements**

#### **Grantees will:**

- (1) Identify the backbone support organization to manage and support the Regional STEM Hub by serving the roles of project manager, data manager, communication provider and professional development facilitator.
- (2) Engage in continuous communication both within and between Regional STEM Hubs to support a Statewide STEM Network.
- (3) Participate in at least four statewide STEM network meetings and monthly calls.
- (4) Fully commit to inclusive partnerships that are reflective in the vision and mission of the Regional STEM Hubs Partnership Plan
- (5) Commit to addressing issues of the historically underserved and underrepresented populations; specifically, culturally and linguistically diverse students, students navigating poverty and female students.

#### **The Oregon Department of Education (ODE) in collaboration with the Chief Education Office (CEdO) will:**

- (1) Provide grantees access to facilitated exchanges of best practices and shared expertise.
- (2) Facilitate communications between Regional STEM Hubs to create a sustainable Statewide STEM Network.
- (3) Share evidence-based practices that foster positive learning outcomes.
- (4) Provide localized technical assistance to support the development of the Hubs

### **E. Use of backbone funds**

These funds are to be exclusively used to support backbone functions of the Regional STEM Hubs, and not the delivery of specific programming. Grantees must be able to spend funds according to acceptable accounting procedures and be able to provide evidence of such procedures. All funds will be provided through the Electronic Grants Management System (EGMS). Costs must be necessary and reasonable to carry out backbone functions and not prohibited under State or local laws.

Reasonable costs will not exceed that which would be incurred by a prudent person, are ordinary and necessary for the operation of the program, and represent sound business practices. Lack of documentation is a primary reason for audit findings. Documentation must be available to support all expenditures and may be requested by the Oregon Department of Education at any time.

Funds will be available upon official notification February 2, 2016 through June, 30, 2017. Under certain circumstances, ODE can approve use of grant funds between June 30, 2017 and September 30, 2017. Grant funds may not be used outside of the award period.

Note - Administrative costs must not to exceed 5% of the total proposed budget. There is an expectation of matching funds which is outlined in the Application Narrative in the Budget Worksheet section.

**Backbone funds may not be used for:**

- Costs associated with writing the proposal.
- Contractual obligations that extend beyond June 30, 2017, or began prior to the award date.
- Purchase of equipment that becomes the property of any individual or organization other than eligible project partners or recipients.
- Purchase of services for personal benefit beyond the Hubs backbone functionality.
- Support for travel to out-of-state professional meetings/conferences unless the meeting is identified in the proposal and attendance will directly and significantly advance the project.
- Purchase of office equipment unless directly linked to outcomes.
- Program activities hosted or conducted by the STEM Hub

**F. Reporting and Assurances**

Successful proposals will include specific outcomes that align to the [STEM Pathways document](#) and the [STEM Hub Outcomes Framework](#) with a data collection and evaluation plan that will provide evidence there has been progress toward meeting those outcomes within the timeline of the grant. Progress must be documented and measureable, observable through anecdotal records, or documented through other records. The results of the evaluation will be reported to the Oregon Department of Education ODE as part of the Final Grant Report. The evaluations will be included in the report to the Oregon Legislature and may be published on the ODE website or in other state publications. The evaluations will be included in the report to the Oregon Legislature. Any submission of evaluation materials (e.g., video or photographs) that include images of minors must be accompanied by a signed release form by a parent or guardian.

To facilitate evaluation of the grant by ODE and the Chief Education Office, recipients will provide additional data related to the impact of the STEM Hub on students, teachers and community partners. This data may include but are not limited to the following:

- Target Goals that address how underserved and underrepresented populations will be an supported during the 2015-2017 biennium and beyond
- An interim grant report, due in August, 2016
- Data and information requests during legislative sessions
- A final grant report, due in August, 2017
- Ongoing site visits and interviews and/or surveys conducted by the Chief Education Office, ODE staff and/or evaluators

The interim and final grant reports will contain, but are not limited to the following:

- Narrative information regarding the successes and challenges encountered in implementing the grant-funded program
- The number of students served by various aspects of the grant. Programs should be able to break down the number of students by Race/Ethnicity, Gender, LEP Status, Special Education Status and Economically Disadvantaged Status.
- The number of teachers served by various aspects of the grant. Programs should be able to break down the number of teachers by Race/Ethnicity as well as identify any teachers served who teach Special Education or ELL classes.
- Other information as needed (e.g., changes to program logic model, timeline of progress, plans for sustaining the program)

By signing the assurances included in this application, products and materials created as a result of the Regional STEM Hub grant will be made available for unrestricted reuse and recombination according to the following Creative Commons licensing agreement: <http://creativecommons.org/licenses/by-nc-sa/4.0/>. In addition, public school districts, educational service districts, public charter schools, community colleges and public universities, business, industry and community partners agree to cooperate with ODE and the Chief Education Office to collect and report such data to the extent that it is possible.

### **G. Scoring and Appeals Process**

Applications must be electronically submitted to Elisa Rodrigues ([Elisa.Rodriguez@ode.state.or.us](mailto:Elisa.Rodriguez@ode.state.or.us)) at the Oregon Department of Education by 2:00 p.m. on **January 19, 2016**. All applications will be scored by a review committee using the scoring criteria similar to that provided in this document. Each application will have at least three reviewers. When possible, each proposal will be scored by at least three reviewers from the following sectors: business, industry, STEM community member, student-focused nonprofit, Oregon's equity team, education, professional development, or afterschool provider. No direct applicant or others with a conflict of interest will be accepted as a reviewer.

After scores are compiled, the applications will be placed in rank order. The STEM Review Committee will make final recommendations based on the score, funding requirements established in the Oregon Legislative Budget Notes for the STEM Initiatives, adequate geographic distribution, and overall number of students and educators impacted. The Deputy Superintendent of Public Instruction will make the final award decision.

The Oregon Department of Education will notify both successful and unsuccessful applicants and will provide a summary of comments and suggestions related to their applications. Applicants will have one week from the date of the notification letter to contest the funding decision through the process identified in the notification. Once appeals have been considered, the award decisions made by the Deputy Superintendent are final.

### **III. Application Process**

**A. Timeline with Critical Information**

Dates	Activities
November 19, 2015	Request for Proposals (RFA) available
November 24, 2015	Technical Assistance Webinar – Understanding the RFA at 12:00pm <a href="#">Click here to join</a>
<b>January 19, 2016</b>	<b><i>Applications due to ODE by 2:00PM PDT</i></b>
<b>TBD</b>	Applications reviewed and scored
<b>TBD</b>	Applicants expected to be notified of award (one week to appeal)
<b>TBD</b>	Awards Finalized
<b>TBD</b>	1 <sup>st</sup> Grant Manager Phone/webinar meeting
March 2016, August 2016, January 2017, and May 2017	Statewide Regional STEM Hub Convening – Tentative dates
Monthly Communication	Ongoing Regional STEM Hub Phone/webinar Meeting
October 15, 2016	Full Interim Report Due to support the 2017 legislative session
April 1, 2017	Notice of intent to use funds during the summer of 2017
June 30, 2017	Last day to expend funds
August 15, 2017	Last date to draw funds (note: EGMS system shutdown approx. two weeks to update index numbers in late July – early August)
August 31, 2017	Final grant report due (for awardees not delivering programs July 1 – September 30, 2017)

**Funding for Summer Backbone Activities July 1 2017 through September 30, 2017**

Proposals awarded under this RFA will be funded for eligible expenses incurred through June 30, 2017. Under specific ODE guidelines, awardees may also receive advanced payment for summer activities occurring between July 1, 2017 and September 30, 2017. Awardees will be required to submit an updated proposal to ODE that outlines anticipated summer expenditures no later than April 1, 2017. The proposal should be based on activities identified and budgeted for in this RFA and may only use remaining grant funds. **No additional funds will be awarded for summer activities.**

Any funds not expended by the awardee will need to be returned to ODE with the final report. **The following timelines are only applicable to funded programs that are intending on delivering summer activities between July 1, 2017 and September 30, 2017 with the existing funding.**

Completion Dates	Summer Related Activities
April 1, 2017	Application to utilize funds for summer programs July 1-September 30 2017
June 30, 2017	Summer activities transitional period



October 31, 2017

Final report for all grant related activities

**B. Required Application Section**

- (1) **Application Cover Page** – Complete and include the form provided in Appendix B
- (2) **Statement of Commitment from Each Lead Partner** – School District(s) and/or Educational Service District(s), Student-focused Nonprofit(s), Postsecondary Institution(s) and an Industry/Business/Workforce Partner complete and sign the Statement of Commitment provided in Appendix B and include in the application.
- (3) **List of Additional Partners** – Complete and include this form provided in the appendix
- (4) **Application Narrative** – Please refer to the specific format section listed as Application Narrative in the following section. This section may not exceed **12** pages (does not include budget narrative and worksheet).
- (5) **Budget Worksheet and Budget Narrative** – The budget worksheet should clearly reflect the backbone functionality in the grant and represent reasonable costs. Budget worksheets are provided in Appendix C. The budget narrative should provide clarity to the budget worksheet by describing how the amounts in the worksheet were determined. Major single expenditures should be itemized and linked to specific operations of the STEM Hub.
- (6) **Appendix** – Not required, however, any supporting charts, graphs, and tables may be placed in the appendix and referenced in the Grant Narrative.

**C. Format and Application Instructions for Submission**

- 12-point font, Times New Roman
- Double spaced
- 1-inch margins on the sides, top, and bottom of 8½” by 11” paper
- **12** page narrative maximum, (excluding: cover page, statement of commitments, assurances, bibliography, budget worksheet and budget narrative)
- No faxed applications
- Numbered pages
- Name the file in this format: **The agency** it is being submitted from, **underscore**, and **Emerging Regional STEM Hub Backbone Grant** (e.g. Oregon Department of Education\_ Emerging Regional STEM Hub Backbone Grant)

An electronic version of the **1) completed application, 2) a scanned copy of the signed Statement of Assurances and 3) Statement of Commitment**, in Word (.doc or .docx), or a PDF format must be received by 2:00 pm on **January 19, 2016**. Please use the Secure File Transfer Process outlined below to submit the electronic version of the grant application.

**Secure File Transfer Process** – An electronic version of the complete application must be submitted to Elisa Rodriguez ([Elisa.Rodriguez@ode.state.or.us](mailto:Elisa.Rodriguez@ode.state.or.us)) using the Secure File

Transfer system available on the ODE district website:  
<https://district.ode.state.or.us/apps/xfers/>. Follow the instructions provided on the secure file transfer website. Multiple files must be compressed (zipped) into a single folder for submission. Please name the files as follows: **the agency** it is being submitted from, **underscore**, and **Emerging Regional STEM Hub Backbone Grant** (e.g. Oregon Department of Education\_ Emerging Regional STEM Hub Backbone Grant). Only complete applications submitted by the due date will be scored. Contact the ODE helpdesk at 503-947-5715 if you need assistance with the Secure File Transfer Process.

**Applicants, please also mail a hard copy of the following: 1) the completed application, 2) the original signed Statement of Assurances and 3) Statement of Commitment which should be postmarked by **January 19, 2016** to:**

Oregon Department of Education  
Office of Learning  
255 Capitol Street NE  
Salem, Oregon 97310-0203  
Attention: Elisa Rodriguez

Envelopes must be plainly marked: *Request for Proposals-Emerging Regional STEM Hub Backbone Grant*

*An electronic version of the Grant Application must be received by:*

**2:00 PM on **January 19, 2016****

#### **IV. Application Narrative**

**Please complete the following:**

The purpose of this application is to provide support for emerging regional STEM partnerships to develop a formalized local framework, a “Partnership Plan” (a.k.a. business plan or operational plan), that will specify the goals, vision and outcomes as well as guide the long-term governance of the Emerging Regional STEM Hub. Successful applicants will be able to demonstrate a

“readiness to benefit” by articulating: a compelling regional need for such a Hub; a clear vision as to the Hub’s purpose and the changes being sought; leadership capacity and community commitment; initial, highly-probable programmatic strategies that will achieve the outcomes; and inclusive community engagement process that will be used to create the more comprehensive [Partnership Plan](#).

**(A) Vision and Mission (No more than two pages in length.)**

- What is the extent of the geographic region that is included in your partnership?
- What is the long-term vision and purpose of the partnership, tied to the broader economic and social needs of the community?
- What are the STEM related needs and challenges to students, teachers, and the community? In particular, address issues of the historically underserved and underrepresented population; specifically, culturally and linguistically diverse students, students navigating poverty and female students. Provide relevant student and economic data that relate to those needs.
- Why is this partnership critical to the community being served?
- What are the expected changes you hope to see because of this collaboration?

**(B) History and Content**

- Describe your current STEM collaborations and the history of success this partnership has that are the foundations for this broader partnership initiative.
- How are current partnership resources being provided? (ex. human, financial, in-kind)
- What are the special attributes and resources in the community that will enable this partnership to be effective?
- What additional partners and stakeholders will be recruited for the long-term sustainability of this Regional STEM Hub?
- What is the relationship between your STEM Hub and other regional efforts? (e.g., regional achievement compact, math and science partnership, early learning council hubs, CTE regional networks, health collaborative, etc.)

**(C) Governance & Backbone**

- What will be the operating and legal structure of your STEM Hub, including: backbone organization, staffing, committees, and partnership agreements?
- What process will be used to create the [Partnership Plan](#) (a.k.a. “business plan” or “operational plan”) that will guide the governance and focus of your regional STEM Hub?
- Describe your capacity to implement funding efficiently and effectively throughout the Regional STEM Hub?
- What processes and key performance indicators will be used to assess, and to improve, the quality of the partnership itself?

**(D) Equity**

- What analytical tools, such as the State of Oregon’s Equity Lens, will guide decision-making processes with regards to equity?

- How will you demonstrate a commitment to addressing the components of culturally responsive pedagogy through leadership and community engagement?
- What engagement strategies will be in place to build partnerships thorough the represented region to include collaboration with advocates for culturally and linguistically diverse learners and learners and families navigating poverty?

**(E) Sustainability Plan**

- What is the plan to sustain the programs and infrastructure beyond the funding period? Where will additional revenues come from?
- What is your plan for regularly communicating and engaging with external and internal stakeholders? How will you keep partners engaged and focused on your common work? How will you keep partners engaged and focused on your common work? How will you sustain the involvement of your greater community in your efforts?
- How do you see your regional partnerships growing and adapting over time? Also include, the potential challenges in the long-term viability of the Hub.
- Please provide a sample in Appendix B, of your partnership agreements and a compiled list of the organizations directly involved in the Hub.

**(F) Participation in the Statewide STEM Hub Network**

- How could you benefit from participating in the statewide STEM network?
- Note: Please include travel costs in your budget for 3-5 participants to attend state meetings though the end of the biennium in different regions. (See timetable for potential dates.)

**(G) Partnership Plan Development**

- What community engagement process will be used to draw additional stakeholders into this collaborative and to create your [Partnership Plan](#)? What additional data or input do you need? (Here is a [link](#) to one example of how to establish a Regional STEM Hub using a community engagement approach.)
- How is your partnership incorporating the principles of the [Equity Lens](#), in order to reduce the Achievement Gap in your region? What are the specific activities within your program that are intended to recruit, encourage, engage, and provide opportunities to underserved and underrepresented students and/or educators?
- What is the anticipated timeline needed to complete your Partnership Plan? (*Note: it is expected to be less than 12 months for this grant.*)

**(H) Application Process**

- What process was used, and who was involved, to develop and finalize this application?

**(I) Budget Narrative**

Describe how the amount in each line item of the budget was determined. These should clearly reflect the descriptions identified in the budget worksheet directly relating to the backbone functionality. Major single expenditures should be itemized and linked to the specific grant activities. Also, include the following:

- Identify roles and responsibilities for each individual with a salary funded partially or entirely through this grant.
- Identify the nature of the contracted services included in the professional and technical services.
- Identify specific events and venues if travel includes conferences and meetings in other states.
- List representative examples of supplies and materials.

**(J) Budget Worksheet**

Complete the budget worksheet for the Regional STEM Hub and describe how state funds will be leveraged by private funding, or in-kind donations of time and materials. These matching funds will be used as indicators of support by partners and priority will be given to those which demonstrate the following percentages, based on population densities of your region:

- Metropolitan: 50%
- Micropolitan 35%
- Rural 20%

Please refer to the map located Appendix C to identify the matching fund percentage of the region you directly serve. Additionally, in-kind calculations of staff time should be based on the number of volunteer hours as a % of salaried time for a 4-hour week. Please list additional support that has been committed for the development and implementation to support this Regional STEM Hub.

## Appendix A

- (1) “Achievement Gap” means the gap in achievement (state test scores in science and mathematics as well as post-secondary degree attainment in STEM) that often exists between students who are economically disadvantaged, students learning English as a second language, African American, Hispanic or Native American compared to their peers.
- (2) “Authentic Problem-Based Learning” means using real world questions, problems, and tasks—often drawn from local community issues and industries—as the focus to drive the learning experiences, deepen understanding, and developing rich contextual connections across a variety of STEM and non-STEM disciplines.
- (3) “Career and Technical Education (CTE)” is a comprehensive educational program for students based on industry needs. CTE includes coursework in areas such as health care, engineering, and computer science.
- (4) “Community Engagement” means a broad collaboration and participation between multiple sectors of the community for the mutually beneficial exchange of knowledge and resources to identify local needs and contribute to larger conversations on visioning planning which may include, but not limited to, parent groups and advocacy groups, industry and STEM agencies, economic and workforce groups, student input, and educators.
- (5) “Culturally Responsive” means the implicit use of the cultural knowledge, prior experiences, frames of reference, and performance styles or diverse students to make learning more appropriate and effective for them.
- (6) “Effective STEM Instruction” means the use of evidence-based practices that support interconnected, relevant STEM instruction as stated in definition number fifteen.
- (7) “Effective STEM Leadership” means identifying schools, school districts, post-secondary institutions, business & industry, student-focused nonprofits and community leadership to support implementing and improving STEM teaching and learning in addition to creating a culture that fosters STEM learning with evidence-based resources. Effective STEM leadership develops an understanding of what effective and interconnected STEM education looks like in the classroom and supports the development of learning environments that empower educators to implement innovative STEM education approaches.
- (8) “Effective STEM Learning Environments” means supporting student interaction with STEM education during formal and informal settings in ways that promote deeper understanding of real-world concepts. Such learning environments must engage all students in solving complex problems, using highly interactive learning opportunities that create new opportunities for STEM learning across the core curriculum.
- (9) “Equity Lens” refers to the commitment and principles adopted by the Oregon Education Investment Board to address inequities of access, opportunity, interest, and attainment for underserved and underrepresented populations in all current and future strategic investments.
- (10) “Post-secondary Institution” means:
  - (a) A community college operated under ORS chapter 341.
  - (b) The following public universities within the Oregon University System:
    - (1) University of Oregon.
    - (2) Oregon State University.
    - (3) Portland State University.
    - (4) Oregon Institute of Technology.
    - (5) Western Oregon University.



- (6) Southern Oregon University.
- (7) Eastern Oregon University.
- (c) Oregon Health and Science University.
- (d) An Oregon-based, generally accredited, not-for-profit institution of higher education.
- (11) “Regional STEM Hub” means a commitment of a group of key stakeholders from different sectors such as, but not limited to, school districts, informal education providers, post-secondary institutions, business & industry, student-focused nonprofits, students, families, community members and policy makers, to advance state and local educational goals related to science, technology, engineering, mathematics and career & technical education (CTE).
- (12) “School” means a public middle school, high school, community college, or post-secondary institution offering a comprehensive instructional program. A school may include a discreet comprehensive instructional program within a larger school or college.
- (13) “Statewide STEM Network” means a supportive collaboration between and across Regional STEM Hubs to share knowledge, expertise, insights, and leadership to assist other communities in their efforts to create similar STEM partnerships.
- (14) “STEAM Education” means the incorporation of strategies to enhance science, technology, engineering and mathematics (STEM) education by integrating art and design, and promoting creative possibilities.
- (15) “STEM Education” means an approach to teaching and lifelong learning that emphasizes the natural interconnectedness of the four separate STEM disciplines which mirrors the practices and rich contexts of STEM practitioners. Developing and deepening content knowledge and skills in science and mathematics is the foundation of STEM teaching and learning. The natural connections among science, mathematics and STEM are made explicit through collaboration between educators resulting in authentic and appropriate context built into instruction, curriculum, and assessment. The common element of problem solving is emphasized across all STEM disciplines allowing students to discover, explore, and apply critical thinking skills as they learn.
- (16) “STEM Lab School” means to establish a school that has a student-centered school culture of inquiry with meaningful and authentic learning environments that integrate STEM and/or STEAM education aligned with state, national and industry standards. This cutting-edge learning center will deepen connections between other educational institutions, business, industry, out-of-school educators, and the local community to create and promote STEM career pathways for students. An intentional focus of a lab school is to support the professional learning of current and future educators, the implementation of innovative education models, and educational research in a manner that increases knowledge and capacity of systems and institutions beyond the school itself.
- (17) “STEM Practitioners” refers to individuals engaged in STEM-related professions such as but not limited to, natural resources management, high-tech manufacturing and product development, information technology, industrial design, health sciences, software, scientific research, engineering, data analytics, etc.
- (18) “Student-Focused Nonprofits” means an organization that meets all of the following requirements:
  - (a) Is established as a nonprofit organization under the laws of Oregon;
  - (b) Qualifies as an exempt organization under section 501(c)(3) of the Internal Revenue Code as defined in ORS 314.011; and

- (c) Is focused on providing services to students and/or educators whose goals or mission are focused on impacting and improving student outcomes in STEM education.
- (19) “Underserved Students” are students whom systems have placed at risk because of their race, ethnicity, English language proficiency, socioeconomic status, gender, sexual orientation, differently abled, or geographic location.
- (20) “Underrepresented Students” in STEM are from demographic groups whose representation in STEM fields and industries does not mirror regional and national focus populations specifically, women, African American, Native American, Hispanic and Pacific Islander students which systems have provided insufficient or inadequate balance of opportunity.
- (21) “Wraparound” is the process involves a community care team that consists of the student, his/her natural support system (e.g. family members, friends, etc), and formal support (e.g. social workers, teachers, health care professionals, etc). In essence, the wraparound process, “demonstrates respect for and builds on the values, preferences, beliefs, culture, and identity of the child/youth and family, and their community” (Bruns, Walker, and al., 2004).

**Appendix B****Application Cover Page**

(Please Print or Type – All Fields Must Be Completed)

Requested Funding: \_\_\_\_\_

Total # of students directly served: \_\_\_\_\_

Total # of educators directly served: \_\_\_\_\_

Total # of active partners: \_\_\_\_\_

Name Regional STEM Hub: \_\_\_\_\_

Project Director: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ FAX: \_\_\_\_\_ E-mail: \_\_\_\_\_

Grant Fiscal Agent Name and Title: \_\_\_\_\_

Phone: \_\_\_\_\_ FAX: \_\_\_\_\_ E-mail: \_\_\_\_\_

**2015 - 2017 Statement of Assurances**

- The fiscal agent assures and certifies compliance with the regulations, policies, and requirements as they relate to the acceptance and use of state funds for programs included in this application.
- The recipient or the senior designate agrees to carry out the intent of the Regional STEM Hub and use of funding as proposed in the application.
- On or before October 15, 2016 the fiscal agent will submit an interim evaluation report and August 31, 2017 an end of grant report to the Oregon Department of Education as outlined in the RFA.
- Violations of the rules or laws may result in sanctions, which may include but are not limited to reduction or revocation of grant award.
- The fiscal agent is responsible for adopting and adhering to the [Equity Lens](#) and their principles throughout the Regional STEM Hub governance.
- The applicant certifies that to the best of his/her knowledge the information in this application is correct; that the filing of this application is duly authorized by the governing body of this organization, or institution, and that the applicant will comply with the general statement of assurances.
- The applicant certifies to the best of his/her knowledge the guidelines for Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. § 1232g; 34 CFR Part 99) are being followed. It is a Federal law that protects the privacy of student education records.
- By signing the assurances included in this application, Regional STEM Hubs agree to cooperate with ODE to collect and report such data to the extent that is possible.

Please Print Name of Project Director

Signature of Project Director

Date

*Note: Products and materials created as a result of the Regional STEM Hub grant will be made available for unrestricted reuse and recombination according to the following Creative Commons licensing agreement: <http://creativecommons.org/licenses/by-nc-sa/4.0/>*

**Statement of Commitment from Lead Partners**  
(Please Print or Type)

Regional STEM Hub Name: \_\_\_\_\_

Main Partner Organizations: \_\_\_\_\_

Contact Name: \_\_\_\_\_ Title: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ FAX: \_\_\_\_\_ E-mail: \_\_\_\_\_

Please explain the role of this partner in the proposed Regional STEM Hub Partnership, contributions that this partner will make, and evidence that the proposed activities are integral to this partnership's plan:

*Describe what supports this stakeholder will provide to enhance STEM education. Please provide a statement of commitment and contribute to the Regional STEM Hub resources (financial, in-kind, materials, expertise, etc.), that may continue beyond the life of the grant.*

\_\_\_\_\_  
Print Name of Authorized Agent

\_\_\_\_\_  
Signature of Authorized Agent

\_\_\_\_\_  
Date

**List of Additional Partners  
Regional STEM Hub Partnership**

The following individuals and/or organizations have reviewed, discussed, and agreed to their part in implementing the Regional STEM Hub Plan proposed in this grant application:

	<b>Name</b>	<b>Title</b>	<b>Organization</b>	<b>Role/Responsibilities</b>
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
11.				
12.				
13.				
14.				
15.				
16.				
17.				
18.				

**\*In addition a signed commitment form is required from each of the following stakeholders:**

- **A School District**
- **A Postsecondary Institution**
- **A Student-focused Nonprofit**
- **Business, Industry or STEM Community Partner**

## Appendix C

**Sample Regional STEM-** Please modify as needed.

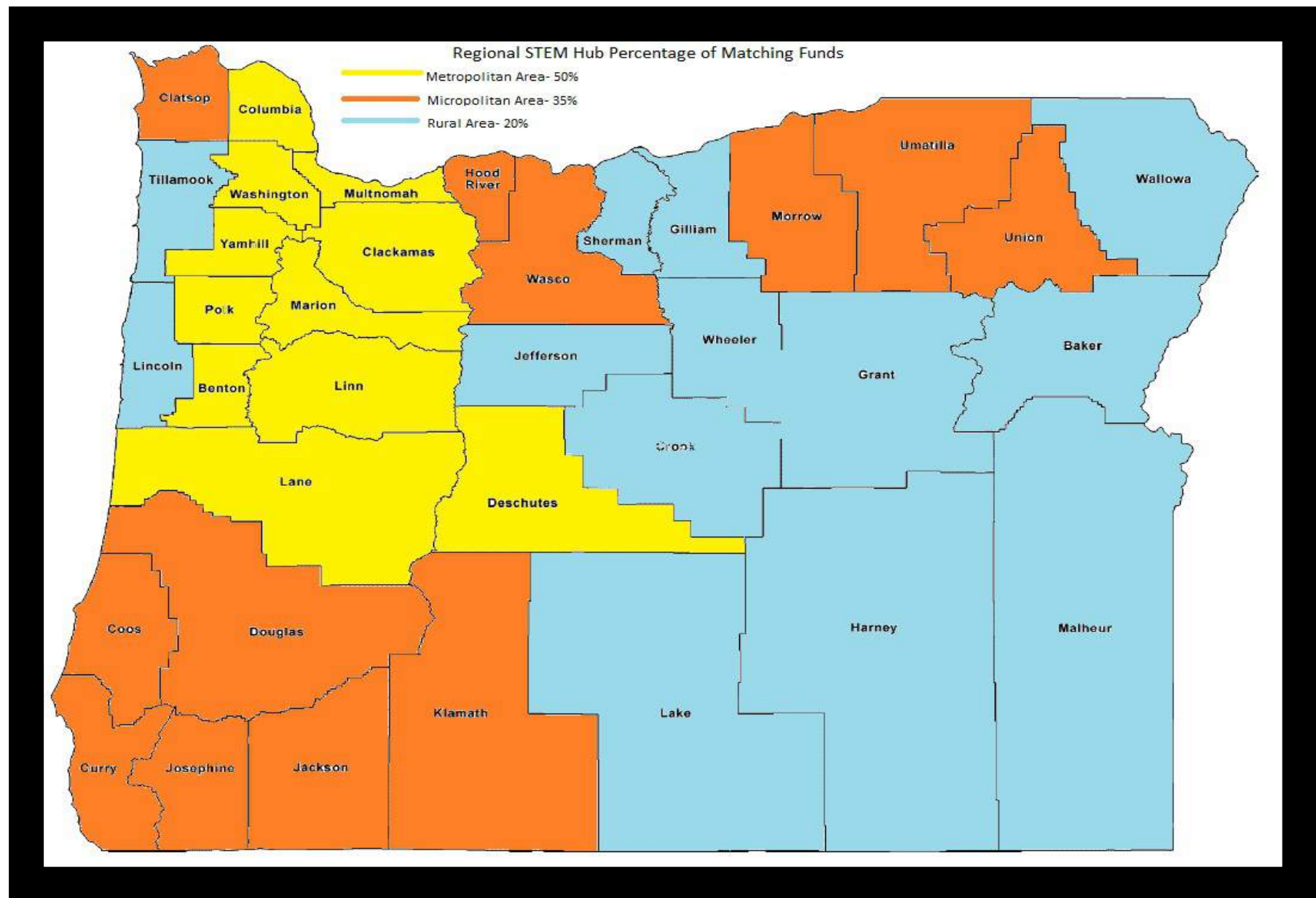
### Grant Budget Worksheet

Project Name: \_\_\_\_\_

Fiscal Agent: \_\_\_\_\_

Possible Grant Charges <u>Please modify as needed.</u>	Operations	Communication	Data Support	Line Total	Anticipated Matching Funds
Staff Salaries					
Staff Benefits					
Instructional, Professional & Technical Services					
In-State Travel					
Travel for Evaluation Meeting (See Grant Requirements)					
Evaluation services					
Other general Professional & Technical Services					
Supplies & Materials					
Non-Consumable Items					
Computer Software					
Computer Hardware					
Capital Outlay (Depreciable Technology)					
<b>Administrative Costs @ 5 %</b>					
<b>Total by Function</b>					





### Roles of Regional STEM Hub Backbone

#### Backbone Functions

<b>Governance and Operations</b>	<b>Communications</b>	<b>Sustainability</b>	<b>Networking</b>	<b>Data Support</b>	<b>Equity</b>	<b>Program Alignment</b>
<ul style="list-style-type: none"> <li>• Convene the partnership</li> <li>• Support governance and steering committees</li> <li>• Act as fiscal agent</li> <li>• Coordinate backbone staffing, hiring, managing</li> <li>• Ensure that new partners and staff are familiar with collaborative's mission, values, and equity stance</li> <li>• The backbone leader(s) demonstrate the 7 common characteristics of effective backbone leadership<sup>1</sup></li> <li>• Ensure space available for meetings</li> <li>• Coordinate and provide back office services (e.g., printing, developing presentation materials, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>• Develop and disseminate communication materials, press releases, maintaining social media, website presence</li> <li>• Track/archive key partnership communications</li> <li>• Release (annual) report that highlights shared mission/plan/goals and the results of collaborative activities and future plans</li> <li>• Enable flow of information between different groups within the partnership</li> </ul>	<ul style="list-style-type: none"> <li>• Mobilize funding</li> <li>• Provide support for partners in obtaining new/ongoing funding</li> <li>• Develop new, and cultivate existing, relationships within the community/region</li> <li>• Develop and implement continuous improvement plans that include iterative strategies that provide feedback on the communities served and how they experienced the service</li> </ul>	<ul style="list-style-type: none"> <li>• Convene work groups</li> <li>• Organize and/or support community meetings/ networks/ learning communities</li> <li>• Develop and maintain new and existing relationships within the community/region</li> <li>• Work closely with the State and other regional initiatives to share questions and insights related to common issues of practice.</li> </ul>	<ul style="list-style-type: none"> <li>• Build culture of data use</li> <li>• Enable access, analysis, and use of data to support the partnership</li> <li>• Report results of data collection to the appropriate audiences, including disaggregating data by subpopulation</li> <li>• Conduct asset/needs mapping to determine what activities/programming exist and develop plan to construct solutions</li> </ul>	<ul style="list-style-type: none"> <li>• Provide evidence of use of an analytical tool that guides decision making processes with regards to equity</li> <li>• Conduct rigorous examination of community assets that can be leveraged in the service of the collaborative and bring to the attention of the Steering Committee/other internal governing board</li> <li>• Promote ability to effectively work with and represent the regional community, including partners who advocate for culturally and linguistically diverse learners and learners and families navigating poverty</li> </ul>	<ul style="list-style-type: none"> <li>• Analyze gaps and overlaps in program activities to align programming needs</li> <li>• Monitor program effectiveness toward achieving targeted outcomes.</li> <li>• Document and disseminate best practices regarding programming and activities throughout the network</li> <li>• Serve as technical support for partner programming</li> </ul>

## Roles of Regional STEM Hub Backbone

Indicators of Success						
Governance and Operations	Communications	Sustainability	Networking	Data Support	Equity	Program Alignment
<b>EXTENT TO WHICH:</b> <ul style="list-style-type: none"> <li>Decision-makers and influencers from different sectors are championing the effort and engaged in governance of the partnership.</li> <li>Collaborative established branded website and email</li> <li>Budget priorities and plan in place</li> <li>Key staff positions identified and filled</li> <li>Backbone staff training developed</li> <li>Back office services provided for meetings, events, as needed</li> <li>Formalized partnership agreements developed and used</li> <li>Decision-making processes clearly identified and used</li> <li>Partners attend meetings and other Hub activities</li> </ul> <b>Frequency of/ satisfaction with:</b> <ul style="list-style-type: none"> <li>Staff/partner perceptions and articulation of aspects of backbone functioning</li> </ul>	<b>EXTENT TO WHICH:</b> <ul style="list-style-type: none"> <li>Community members aware of collaborative goals and activities</li> <li>Social media presence developed and maintained</li> <li>Increase in communications and collaboration among partners</li> <li>Annual report released to community and partners with key data points identified</li> </ul> <b>Frequency of/ satisfaction with:</b> <ul style="list-style-type: none"> <li>Number of press releases, annual report copies, communications released to public</li> <li>Attendance and participation in regular meetings of working groups</li> </ul>	<b>EXTENT TO WHICH:</b> <ul style="list-style-type: none"> <li>Plans for multi-year funding in place</li> <li>Ratio of state dollars/Hub leveraged resources (in-kind and funds)</li> <li>Continuous improvement plan developed and followed</li> </ul> <b>Frequency of/ satisfaction with:</b> <ul style="list-style-type: none"> <li>Number of new resources from community partners (public and private)</li> <li>Number of sponsorships/ internships from community partners</li> <li>Grants funding -- # of grants, total of grants, # of funders</li> </ul>	<b>EXTENT TO WHICH:</b> <ul style="list-style-type: none"> <li>Work groups established that include voices from all relevant sectors and partners</li> <li>Community members are increasingly aware of the issue(s)</li> <li>Community members express support for the initiative</li> <li>Community members feel empowered to engage in the issue(s)</li> </ul> <b>Frequency of/ satisfaction with:</b> <ul style="list-style-type: none"> <li>Number of different community partners</li> <li>Numbers of community partners serving in advisory or leadership roles</li> <li>Types of community partners (e.g., business sector, health services)</li> </ul>	<b>EXTENT TO WHICH:</b> <ul style="list-style-type: none"> <li>Indicators have been established to guide actions and monitor the impact of the partnership.</li> <li>Processes have been established and followed to regularly review data.</li> <li>Infrastructure developed to support data storage, access, analysis, and disaggregation</li> <li>Partners understand the value of shared data</li> <li>Partners use data in meaningful, strategic ways</li> <li>Data is shared publicly and used as part of the communications strategy</li> </ul>	<b>EXTENT TO WHICH:</b> <ul style="list-style-type: none"> <li>Equity analytical tool use in place and shared with members of collaborative</li> <li>Members of target populations contribute to and help to shape the goals of the collaborative</li> <li>Results of community asset mapping used to guide current and future projects</li> <li>Partners feel respected and heard within the collaborative</li> </ul>	<p>Based on the types of activities the backbone provides and/or supports:</p> <p><b>EXTENT TO WHICH:</b></p> <ul style="list-style-type: none"> <li>Partners articulate role in the collaborative</li> <li>Partners increase scope/type of work within defined activities/ programming</li> <li>Identified gaps in programming reduced/ eliminated</li> <li>Resources used for identified overlaps are redeployed to close gaps</li> </ul> <p><b>Frequency of/ satisfaction with:</b></p> <ul style="list-style-type: none"> <li>Programming activities</li> <li>Technical assistance</li> <li>Event facilitation</li> </ul>

<sup>1</sup>-Understanding the Value of Backbone Organizations in Collective Impact (SSIR article, page 7)

## Appendix E

### Emerging Regional STEM Hub Backbone Grant Scoring Rubric

Applicants may use this as a guide when responding to the RFA.

<b>Narrative Elements and Criteria</b>
<p>A. Vision and Purpose (15%)</p> <ul style="list-style-type: none"> <li>• The mission and vision statement clearly identify the purpose and a compelling need for the STEM Hub using supporting data.</li> <li>• Clearly identifies regional issues and needs of underserved and underrepresented students in STEM.</li> <li>• The partnership aligns with the core principles of, and will contribute to, the larger statewide STEM network.</li> <li>• Expected changes are feasible and attainable based on the region's current needs.</li> </ul>
<p>B. History and Context (10%)</p> <ul style="list-style-type: none"> <li>• STEM Hub initiative builds from prior successful partnerships.</li> <li>• Local resources (human, financial, in-kind) are being leveraged from within the community.</li> <li>• Recognizes that broad stakeholder involvement is critical for sustainability, and there are thoughtful plans on how to engage additional partners.</li> <li>• Provides evidence of coordination with other regional partnership networks where applicable.</li> </ul>
<p>C. Governance &amp; Backbone (20%)</p> <ul style="list-style-type: none"> <li>• There are multiple, high-level sector leaders as respected champions of the work and who can represent broad constituencies within their sectors.</li> <li>• Clear description of leadership team, backbone organization, Governance committee, advisory or other committees, meetings, operations, etc.; including structures and decision-making processes.</li> <li>• An effective community-engagement process will be used to establish the Partnership Plan.</li> <li>• Sufficient capacity and infrastructure in place to efficiently and effectively implement grant funding.</li> <li>• Processes are evident and in place to ensure continuous improvement and quality of the partnership.</li> </ul>
<p>D. Equity (15%)</p> <ul style="list-style-type: none"> <li>• The principles in the Equity Lens are reflected throughout the application—in the approach to learning, supports for students and educators, partnerships, and involvement of the community.</li> <li>• The issues and needs of culturally and linguistically diverse learners and learners navigating poverty in the community are explicit and appear well understood.</li> <li>• Strategies for ensuring equity of access to all are well thought out and reflect best practices in community engagement.</li> <li>• Culturally responsive support systems will be in place for students, teachers, parents and community partners.</li> </ul>

## E. Sustainability (10%)

- Awareness exists of potential challenges to the sustainability of the partnership. Formal partnership agreements are in place that detail responsibilities and appropriate commitment of resources (human and/or financial).
- Clearly stated financial sustainability plan that outlasts the grant funding timeline.
- Communication and long-term community engagement plans ensure ongoing support and participation of internal and external stakeholders.
- Thought has been given to how the partnership might evolve and expand over time.

## F. Participation in the Statewide STEM Hub Network (5%)

- Is committed to contributing and participating in the development of a statewide STEM Network.

## G. Partnership Plan Development (15%)

- Has a specific plan and timelines to engage the broader community to gather input and build support for quality STEM outcomes.
- A detailed timeline is provided to deliver a completed Partnership Plan within 12 months.

## H. Application Process (0%)

- Process used meaningful input and involvement of multiple stakeholders and partners.

## I. Budget Worksheet and Narrative (10%)

- Proposed budget is reasonable and appropriate for the scope of the proposed partnership and strategies.
- Budget narrative matches budget items.
- Budget narrative explains what budget items are and their purpose.
- Budget items are allowable based on RFA guidelines.

## Emerging STEM Hub Backbone Scoring Guide

Sections	High Scoring Response	Middle Scoring Response	Low Scoring Response
The application demonstrates clear <b>vision and purpose</b> for their proposed Regional STEM Hub.	The mission and vision statement clearly identifies the long-term vision and purpose in addition to a compelling need for the Regional STEM Hub using extensive supporting data.	The mission and vision statement identifies the vision and purpose and a need for the Regional STEM Hub using some supporting data.	The mission and vision statement identifies the purpose and a need for the Regional STEM Hub but lacks significant supporting data.
	Clearly identifies the issues and needs of underserved and underrepresented students in STEM education. They provide relevant student and economic data in addition to specific evidence-based activities that will ensure the success and continual participation in STEM education programs.	Acknowledges some issues and needs of underserved and underrepresented students in STEM education. They provide relevant student and economic data in addition to some evidence-based activities to support the success and continual participation in STEM education programs.	The proposal generally acknowledges the problems relating to underserved and underrepresented student in STEM education. However, does not identify activities related to recruitment or activities related to success and continued participation of underserved and underrepresented students.
	The partnership fully aligns with the core principles of, and will contribute to, the larger statewide STEM network by identifying all of the following:	The partnership closely aligns with the core principles of, and will contribute to, the larger statewide STEM network by identifying most of the following:	The partnership lacks alignment to the core principles of, and will contribute to, the larger statewide STEM network because the proposal identifies only a few of the following:
	<ul style="list-style-type: none"> <li>a) improve student performance in STEM related content,</li> <li>b) increase interest and improve preparation for STEM careers, and</li> <li>c) become proficient in STEM concepts necessary to make personal and societal decisions.</li> </ul>	<ul style="list-style-type: none"> <li>a) improve student performance in STEM related content,</li> <li>b) increase interest and improve preparation for STEM careers, and</li> <li>c) become proficient in STEM concepts necessary to make personal and societal decisions.</li> </ul>	<ul style="list-style-type: none"> <li>a) improve student performance in STEM related content,</li> <li>b) increase interest and improve preparation for STEM careers, and</li> <li>c) become proficient in STEM concepts necessary to make personal and societal decisions.</li> </ul>



## Emerging STEM Hub Backbone Scoring Guide

Sections	High Scoring Response	Middle Scoring Response	Low Scoring Response
The application demonstrates clear <b>vision and purpose</b> for their proposed Regional STEM Hub.	Expected changes are significant and feasible as well as fully attainable based on the data that relates to the region's current needs.	Expected changes are somewhat feasible and attainable based on the data that relates to the region's current needs.	Expected changes are not feasible and are not attainable based on the data that relates to the region's current needs.
The application provides a clear story of the <b>history and content</b> of community partnerships and program initiatives.	<p>The proposal demonstrates significant partnerships built from prior successful programs and strong collaborations.</p> <p>Local resources (human, financial, in-kind) have been clearly identified, secured and are being leveraged from within the community.</p> <p>The proposal has significant stakeholder involvement for long-term sustainability, and there are explicit plans and multiple strategies on how to engage additional partners for funding beyond the life of the grant.</p> <p>There is clear evidence of multiple coordinated efforts with other regional partnership networks where applicable. (e.g., regional achievement compact, math and science partnership, early learning council hubs, CTE regional networks, health collaborative, etc.)</p>	<p>The proposal demonstrates partnerships built from prior programs and collaborations.</p> <p>Local resources (human, financial, in-kind) have been identified and are going to be leveraged from within the community.</p> <p>The proposal has stakeholder involvement for long-term sustainability, and there are thoughtful plans on how to engage additional partners for funding beyond the life of the grant.</p> <p>There is some evidence of coordinated efforts with other regional partnership networks where applicable. (e.g., regional achievement compact, math and science partnership, early learning council hubs, CTE regional networks, health collaborative, etc.)</p>	<p>The proposal demonstrates disconnected partnerships that have not yet demonstrated programmatic success or strong collaborations.</p> <p>Local resources (human, financial, in-kind) have not been fully identified, but claim to be leveraged from within the community.</p> <p>The proposal has little stakeholder involvement for sustainability, and plans are unclear on how to engage additional partners for funding beyond the life of the grant.</p> <p>There is little or no evidence of coordinated efforts with other regional partnership networks where applicable. (e.g., regional achievement compact, math and science partnership, early learning council hubs, CTE regional networks, health collaborative, etc.)</p>

## Emerging STEM Hub Backbone Scoring Guide

Sections	High Scoring Response	Middle Scoring Response	Low Scoring Response
The application clearly outlines the <b>governance and backbone</b> structures of the partnership that will provide stability and longevity.	Clear description of leadership team, backbone organization, Governance committee, advisory or other committees, meetings, operations, etc.; including structures and decision-making processes.	Description may lack some details about the leadership team, backbone organization, Governance committee, advisory or other committees, meetings, operations, etc.; including structures and decision-making processes.	Description may lack significant details about the leadership team, backbone organization, Governance committee, advisory or other committees, meetings, operations, etc.; including structures and decision-making processes.
	There are multiple high-level sector leaders championing the work and who represent broad constituencies within their sectors.	There are one or two high-level sector leaders championing the work and who represent broad constituencies within their sectors.	There are one or no high-level sector leaders championing the work and who represent broad constituencies within their sectors.
	Sufficient capacity and infrastructure in place to efficiently and effectively implement grant funding.	There is some capacity and infrastructure in place to efficiently and effectively implement grant funding.	There is no sufficient capacity and infrastructure in place to efficiently and effectively implement grant funding.
	Key performance indicators and processes are identified to ensure continuous improvement and quality of the partnership.	Some key performance indicators and processes are in place to ensure continuous improvement and quality of the partnership.	There are few or no key performance indicators and processes in place to ensure continuous improvement and quality of the partnership.
The application clearly understands issues of <b>equity</b> by identifying systemic challenges and has strategic plans to leverage community assets through culturally responsive practices.	Addresses specific strategies that are clearly connected with the Equity Lens.	Indicates some connections to the principles of the Equity Lens.	The proposal does not align with the principles of the Equity Lens.
	Clearly addresses the issues and needs of culturally and linguistically diverse learners and learners navigating poverty in STEM education.	Addresses some of the issues and needs of culturally and linguistically diverse learners and learners navigating poverty in STEM education.	Addresses few of the issues and needs of culturally and linguistically diverse learners and learners navigating poverty in STEM education.

## Emerging STEM Hub Backbone Scoring Guide

Sections	High Scoring Response	Middle Scoring Response	Low Scoring Response
	<p>Relevant student and economic data are provided and robust.</p> <p>Clearly identifies the specific evidence-based practices and strategies that ensure equitable access to opportunities.</p> <p>Explicit evidence of culturally responsive support systems for students, educators, parents and community partnerships is explicit such as implicit use of the cultural knowledge, prior experiences, frames of reference, and performance styles of diverse students to make learning more appropriate and effective for students.</p>	<p>There is some relevant student and economic data, but is vague.</p> <p>Identifies some evidence-based practices and strategies that ensure equitable access to opportunities.</p> <p>Some evidence of culturally responsive support systems for students, educators, parents and community partnerships is present such as cultural knowledge, prior experiences, frames of reference, and performance styles of diverse students to make learning more appropriate and effective for students.</p>	<p>They provide little relevant student and economic data.</p> <p>Identifies few evidence-based practices and strategies that ensure equitable access to opportunities.</p> <p>Little evidence of culturally responsive support systems for students, educators, parents and community partnerships is present.</p>
<p>The application has a feasible <b>sustainability plan</b> that demonstrates a commitment of long-term resources.</p>	<p>There are significant formalized partnership agreements in place that detail responsibilities and appropriate commitment of resources (human, physical, and/or financial).</p> <p>The proposal has clearly identified a feasible financial sustainability plan that outlasts the grant funding timeline.</p> <p>There are explicit communications and long-term community</p>	<p>There are some formal partnership agreements in place that detail responsibilities and appropriate commitment of resources (human, physical, and/or financial).</p> <p>The proposal has identified a financial sustainability plan that outlasts the grant funding timeline that may lack some feasibility.</p> <p>There are implied communications and long-term community</p>	<p>There are insufficient partnership agreements in place that detail responsibilities and appropriate commitment of resources (human, physical and/or financial).</p> <p>The proposal does not identify a financial sustainability plan that outlasts the grant funding timeline.</p> <p>There are no communications and long-term community engagement</p>

## Emerging STEM Hub Backbone Scoring Guide

Sections	High Scoring Response	Middle Scoring Response	Low Scoring Response
	<p>engagement plans ensure ongoing support and participation of internal and external stakeholders.</p> <p>Significant thought has been given to how the partnership might evolve and expand over time.</p> <p>Clear awareness exists of potential challenges to the sustainability of the partnership.</p>	<p>engagement plans ensure ongoing support and participation of internal and external stakeholders.</p> <p>Some thought has been given to how the partnership might evolve and expand over time.</p> <p>There is some awareness of the potential challenges to the sustainability of the partnership.</p>	<p>plans ensure ongoing support and participation of internal and external stakeholders.</p> <p>No thought has been given to how the partnership might evolve and expand over time.</p> <p>There is no awareness of the potential challenges to the sustainability of the partnership.</p>
The application presents clear expectations to <b>participate in the Statewide STEM Hub Network.</b>	<p>The proposal clearly demonstrates a commitment to fully contribute and participate in the development of a statewide STEM Network.</p> <p>There is clear evidence of multiple coordinated efforts with other regional partnership networks where applicable. (e.g., regional achievement compact, math and science partnership, early learning council hubs, CTE regional networks, health collaborative, etc.)</p>	<p>The proposal demonstrates a willingness to contribute and participate in the development of a statewide STEM Network.</p> <p>There is some evidence of coordinated efforts with other regional partnership networks where applicable. (e.g., regional achievement compact, math and science partnership, early learning council hubs, CTE regional networks, health collaborative, etc.)</p>	<p>The proposal lacks a willingness to contribute and participate in the development of a statewide STEM Network.</p> <p>There is little or no evidence of coordinated efforts with other regional partnership networks where applicable. (e.g., regional achievement compact, math and science partnership, early learning council hubs, CTE regional networks, health collaborative, etc.)</p>
The application has demonstrated a well-designed <b>partnership plan</b> that can be fully developed in twelve months.	<p>Has a specific plan to engage the broader community to gather input and build support for high quality STEM outcomes.</p> <p>The community-engagement strategy to develop the Partnership Plan is well articulated with specific milestones, and reaches the majority of key stakeholders.</p>	<p>Has an outlined plan to engage the broader community to gather input and build support for quality STEM outcomes.</p> <p>The community-engagement strategy to develop the Partnership Plan is only moderately thought through, and/or reaches only a limited number of key stakeholders.</p>	<p>Has a general plan to engage the some in the community to gather input and build support for STEM outcomes.</p> <p>The community-engagement strategy to develop the Partnership Plan is poorly thought through, or non-existent.</p>

## Emerging STEM Hub Backbone Scoring Guide

Sections	High Scoring Response	Middle Scoring Response	Low Scoring Response
	A very detailed and explicit timeline is provided to deliver a completed Partnership Plan within twelve months.	A detailed timeline is provided to deliver a completed Partnership Plan within twelve months but lacks some specificity.	A timeline is provided, however, lacks significant information in how a Partnership Plan will be completed within twelve months.
The application <b>budget worksheet and budget narrative</b> are aligned and demonstrate responsible fiscal expenses.	<p>The proposed budget is reasonable and appropriate for the scope of the proposed partnership and activities.</p> <p>The budget worksheet and budget narrative aligns with the design, activities and outcomes in proposal.</p> <p>The budget narrative is explicit and explains what budget items are and their purpose.</p> <p>The budget items are allowable based on RFA guidelines.</p>	<p>The proposed budget is somewhat reasonable and appropriate for the scope of the proposed partnership and activities.</p> <p>The budget worksheet and budget narrative substantially, but not completely aligns with the design, activities and outcomes in proposal.</p> <p>The budget narrative generally explains what budget items are and their purpose.</p> <p>The budget items are somewhat allowable based on RFA guidelines.</p>	<p>The proposed budget is not reasonable or appropriate for the scope of the proposed partnership and activities.</p> <p>The alignment between the budget worksheet, budget narrative, design, activities and outcomes is unclear.</p> <p>The budget narrative does not explain what budget items are or their purpose.</p> <p>The budget items are not allowable based on RFA guidelines.</p>



## HILLSBORO ENTERPRISE ZONE PROGRAM

### OVERVIEW

The Hillsboro Enterprise Zone program allows a 100% property tax abatement for eligible businesses on new qualified capital assets (not currently on the tax rolls) within the designated enterprise zone for a three to five year period.

### ELIGIBLE BUSINESS

Eligible businesses are primarily firms that provide goods, products, or services to businesses or other organizations through, but not limited to, manufacturing, processing, shipping, assembly, and fabrication. In addition, businesses engaged in retail or financial services are eligible if (1) the activity serves customers by responding to orders or requests received only by telephone, computer, the Internet or similar means of telecommunications; and (2) not less than 90 percent of the customers or orders are located and originate in an area from which long distance phone charges would apply if the order were placed by phone.

The business use must meet the current zoning regulations for the property, be within the enterprise zone boundary and the site must be annexed to the City of Hillsboro.

### PROGRAM REQUIREMENTS

#### State

- Increase full time, permanent employment of the firm within the enterprise zone by the greater of one new job (new businesses to Hillsboro) or 10 percent (expansion of existing Hillsboro businesses)
- No concurrent job losses more than 30 miles from the zone
- Maintain employment levels during exemption period
- Enter into a First-Source Agreement with the local job training provider, Worksource Oregon.
- Do not retire, sell, or transfer exempt assets until the end of the exemption period.
- Satisfy additional local conditions (See below.)

#### Hillsboro

- **Minimum Investment** of \$1 million is required in the North Industrial Enterprise Zone Area or a minimum of \$250,000 investment in the Downtown and South Industrial Enterprise Zone Areas.
- **Procurement Plan** that increases purchases from Hillsboro-based companies by 10% annually.
- **Job Quality/Wages:** (1) average of all hourly wages must be at least 150% of Oregon minimum wage for a 3 year tax abatement (2) at least 75% of hourly wages must exceed 200% of Oregon minimum wage for a 4-5 year tax abatement; (3) benefits are provided at an hourly value equal or greater than 20.2% of the average hourly salary for all years of exemption and (4) training and advancement opportunities will be offered to all employees.
- **Application Fee** will be paid to the City of Hillsboro in the amount equal to 0.1% of the total estimated value of investment; fee capped at \$25,000.
- **Community Service Fee** applies to businesses seeking a 4-5 year exemption. The fee will be calculated at a rate of 25% of the abated taxes for years 4 and 5 and is paid to the City of Hillsboro annually.

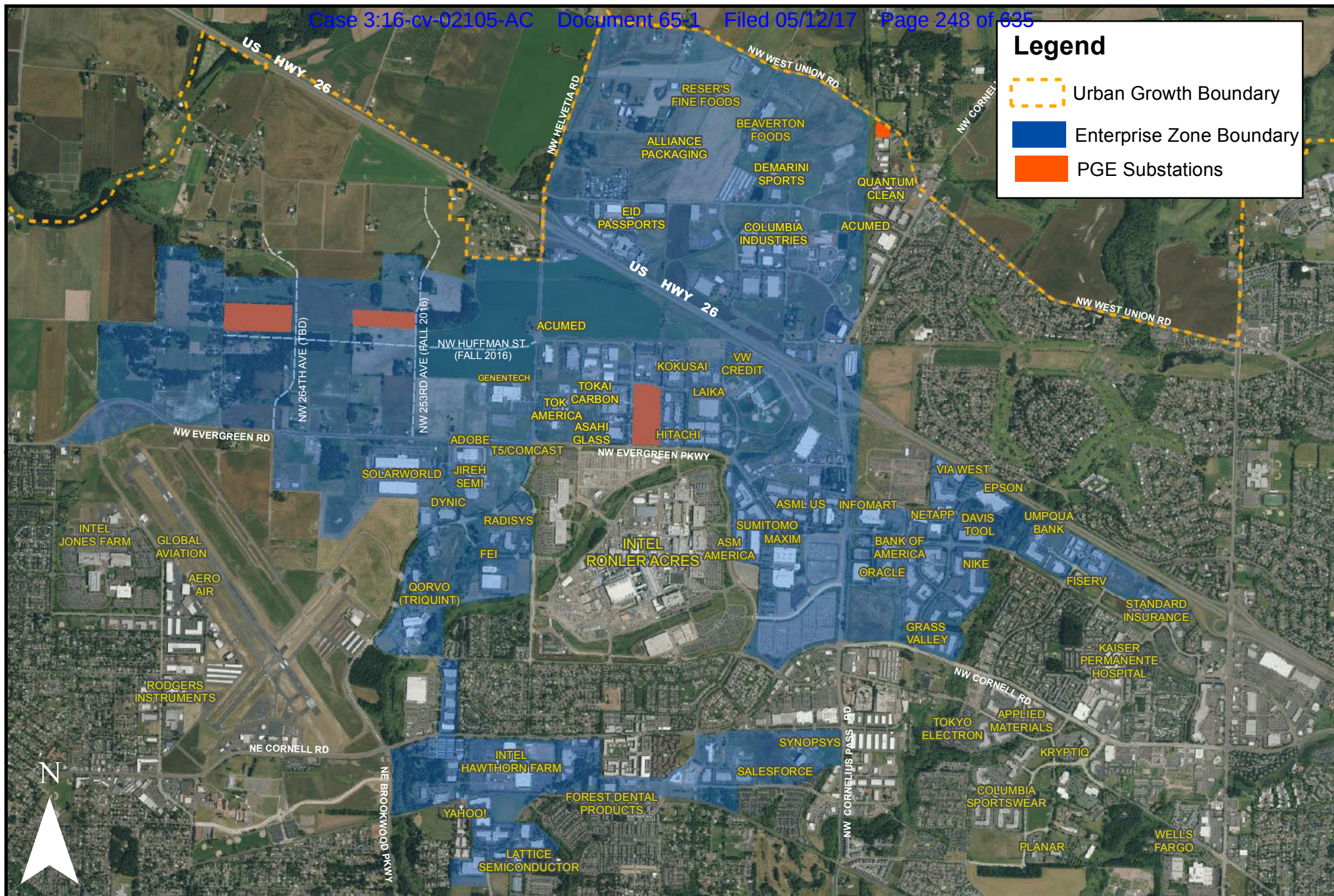
### APPLICATION

Businesses interested in the Hillsboro Enterprise Zone program can obtain application information from Valerie Okada at 503-681-6112 or via email at [val.okada@hillsboro-oregon.gov](mailto:val.okada@hillsboro-oregon.gov).

### MAPS

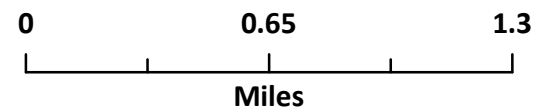
Investment must occur within the boundary of the enterprise zone. See map on reverse for boundary details.





# North Hillsboro Enterprise Zone

Date: 4/30/2015







## **Hillsboro Enterprise Zone Fund - Workforce Development Program**

The City of Hillsboro's Enterprise Zone Fund Workforce Development program is targeted to increase employment, training opportunities, education and job skills for residents and business success for companies in Hillsboro.

Companies utilizing the Hillsboro Enterprise Zone and applying for the extended abatement (years 4-5) are required to pay a community service fee. This fee will be calculated at a rate of 25% of the abated taxes for years 4 and 5, and is paid by the company to the City of Hillsboro in two annual payments due October 15th of year 4 and 5 of the abatement. Specific programs utilizing these fees are developed by the City of Hillsboro in conjunction with community partners that include (but are not limited to): Worksystems Inc., Oregon Employment Department, Portland Community College and the Hillsboro Chamber of Commerce.

### **Objectives:**

- To create opportunities for low income and/or first generation college students in Hillsboro
- To increase the skill levels of employees at Hillsboro companies in order to improve their economic success
- To provide small business owners within the enterprise zone with training that helps them grow their businesses in Hillsboro
- To increase skill levels & employment opportunities for Hillsboro and enterprise zone residents

### **Strategies:**

A set of strategies are being initially utilized to meet the above objectives. Those strategies will be continually evaluated as to their success in meeting the program objectives. The initial strategies focus on:

- Youth
- Incumbent workforce
- Small business owners
- Manufacturing training and skill enhancement

### **Youth Program - Future Connect**

Future Connect is designed to increase education and job skill levels of low income and/or first generation college students in Hillsboro. Students attend Portland Community College's Rock Creek campus. PCC's background with the program shows that services such as those offered by Future Connect can nearly double the retention, graduation and transfer rates of students. Priority in recruitment is given to qualifying students attending high schools in and proximate to the City's enterprise zone areas. To date, the program has funded three cohorts for a total of 150 students.

### **Hillsboro Adult/Incumbent Worker Program - English for Speakers of Other Languages (ESOL) for manufacturing employees**

The program is designed and delivered by PCC to provide customized training in helping limited English speaking workers improve their communication skills in the workplace. Classes provide opportunities for workers to gain the knowledge, skills, and confidence in communicating in English with supervisors, co-workers, and other personnel. The classes will be offered on a schedule to be determined by the participating company and PCC. Students are grouped based on their proficiency level during the intake process. Program guidelines are as follows:

1. Hillsboro company receiving enterprise zone benefits – fully funded by the City enterprise zone funds for all employees.
2. Hillsboro company not receiving enterprise zone benefits – first two – eight week sessions are fully funded by the City and subsequent sessions require a 50% match by the company.

To date, 54 employees have participated in the ESOL program at two companies.

### **Hillsboro Small Business Program - SBDC Small Business Management Classes**

The program is designed to provide small business owners in the enterprise zone with business education and support services in key areas such as financing, accounting, marketing and developing systems to grow their business. The business must have been in operation for at least one year. The Hillsboro business owners targeted for attendance first are the Downtown merchants. The requirements for the business owners to enroll in the program are as follows:

1. Businesses must reside within the South Industrial/CBD Enterprise Zone.
2. Business owners must participate in the SBDC screening process and agree to attend the entire program (10 sessions).
3. COH will scholarship 80% or \$800 to qualified businesses, the remaining \$200 will be paid by the business to PCC.

4. Business owner agrees to reimburse COH for the scholarship if they are unable to attend at least 8 sessions (unless cancellation is due to illness or force majeure).

The program includes the following:

- 30 hours of in-class business education held once a month for 10 months. The monthly 3 hour sessions are taught by subject-matter professionals
- 20 hours of one-on-one business advising in confidential meetings
- Cohort learning and networking to discuss challenges and find solutions with peers
- Access to 20+ veteran business advisors with a wide range of backgrounds and expertise

Business who apply for the small business training courses are pre-qualified by the PCC Small Business Development Center. The SBDC will determine the course level and also ensure that the business owners have the resources and can commit the time required to complete the course.

To date, five downtown businesses are enrolled in the program.

### Hillsboro Manufacturing Training Initiative

Worksystems Inc. (WSI) and the City of Hillsboro have the mutual goal of facilitating the training, hiring, and retention of new workers in manufacturing. Both organizations have resources and grant funds that are directed toward strategies to achieve this goal. Aligning these resources in a way that maximizes Hillsboro manufacturers' ability to hire and retain a skilled and qualified workforce is pragmatic and beneficial. WSI and the City of Hillsboro intend to facilitate the training, hiring and retention of new and diverse workers through the following strategies:

- Recruitment, coordination and delivery of a Washington County Certified Production Technician (CPT) training cohort. The CPT training will prepare individuals for entry level work in the manufacturing sector. Participants will receive a portable, nationally recognized credential from which they can build on. The City of Hillsboro will support CPT training costs for Hillsboro residents with the goal of connecting them to Hillsboro area manufacturers.
- The development of an On-the-Job Training (OJT) resource pool to support new hires at Hillsboro manufacturers coming from the WorkSource Portland Metro system. The OJT program provides funding to a business for training they provide to new hires while on the job. OJT payments are based on a 50% wage reimbursement over a designated training period. City of Hillsboro will support OJT costs for Hillsboro residents who are connected to employment.

To date, four Hillsboro residents recently completed the CPT training.

FY 2016 Budget:

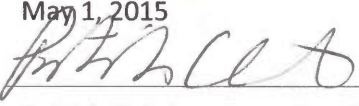
Program	FY 15 Expenditures	FY 16 Budget
Future Connect	\$100,000	\$100,000
ESOL Program	\$66,666	\$150,000
Small Business Program	\$9,776	\$ 30,000
Manufacturing Training Initiative	\$12,244*	\$250,000
Total	\$188,686	\$530,000

\*estimate



## Administrative Procedures

---

<b>Subject:</b>	Equity	<b>Page:</b>	Page 1 of 11
<b>Effective Date:</b>	May 1, 2015		
<b>Approved By:</b>	 Patrick Quinton, Executive Director		
<b>Sponsor:</b>	Executive Director		
<b>Owner:</b>	Director, Communications and Social Equity		

---

PDC's administrative procedures on Equity (these "Procedures") impact all PDC projects, programs, and internal functions either directly or indirectly. All staff should become familiar with this document and what it seeks to accomplish. These Procedures should also be carefully reviewed when planning any new project or program, hiring or promoting PDC employees, contracting for goods and services, and engaging in other activities such as renting space or hiring a caterer to host a PDC-sponsored event.

These Procedures are organized as follows:

- **Part One:** Policy Objectives, Guiding Principles, and Authority
- **Part Two:** Managing Investments to Support Equitable Outcomes
- **Part Three:** Contracting-Based Equity Programs
- **Part Four:** Human Resources Equity Plan
- **Part Five:** Other Internal Equity Measures
- **Part Six:** Definitions

### PART ONE – POLICY OBJECTIVES, GUIDING PRINCIPLES, AND AUTHORITY

---

- 1.1 **Definitions.** The capitalized terms found in these Procedures are defined in Part Six.
- 1.2 **Policy Objectives.** These Procedures guide the implementation of PDC Board Resolution #6988, "[Adopting the Equity Policy of the Portland Development Commission](#)" (the "Policy"). The Policy aims to ensure that PDC's strategic goals, outcomes, programs, and initiatives advance social and economic equity by:
- Increasing economic opportunity and income for all Portland residents and Historically Disadvantaged Portlanders;
  - Making use of all of PDC's revitalization and economic development activities to create equitable access to living wage jobs and wealth creation opportunities for Portlanders; and
  - Demonstrating PDC's commitment to and leadership in social equity through internal business practices, robust community partnerships, and accountability measures.



**1.3 Guiding Principles.** In order to fulfill the objectives of the Policy, PDC will:

- Manage all investments, projects and programs in a manner which considers beneficiaries, addresses disparities, and supports equitable outcomes as further described in Section 4.2 of the Policy and Part Two of these Procedures;
- Maximize community benefits from PDC programs and investments through living-wage construction jobs, career advancement, and business opportunities for Historically Disadvantaged Portlanders as further described in Section 4.3 of the Policy and Part Three of these Procedures; and
- Ensure that PDC's internal business practices increase diversity and social equity within PDC and support partnership, transparency, and accountability as further described in Section 4.4 of the Policy and Parts Four and Five of these Procedures.

## **PART TWO – MANAGING INVESTMENT TO SUPPORT EQUITABLE OUTCOMES**

Part Two of these Procedures concerns impacts of PDC financial and non-financial investments in the community. Questions about sections 2.1 and 2.4 should be directed to PDC's Communications and Social Equity Director; questions about sections 2.2 and 2.3 should be directed to PDC's Deputy Director.

**2.1 Community Engagement.** PDC shall engage the community in ways that allow for meaningful public involvement of people impacted by PDC Activities. Such involvement may include, but is not limited to, the following:

- Creation of project or program advisory groups whose membership reflects the communities affected by PDC activities;
- Assessment and accommodation of multicultural and multilingual needs; and
- Working closely with all communities, particularly Historically Disadvantaged Portlanders, to address structural disparities, create pathways to prosperity, and determine the process for community involvement and governance.

**2.2 Strategic Alignment and Equity Lens for Loans and Grants.** A "Strategic Alignment and Equity Lens," (or "Equity Lens"), a sample of which is attached in Appendix A, shall be used to evaluate all PDC loans and grants to ensure financial resources address disparities, advance strategic equity objectives, and do not result in negative consequences for the community. The Equity Lens shall be reviewed prior to determining whether to move forward with a request for PDC financial assistance.

**2.3 Equity Plan for non-financial investments.** Staff for each new and existing program, major activity, and non-loan/grant investment shall identify and assess disparities in access or outcomes for Historically Disadvantaged Portlanders. Program staff shall then develop a plan to maximize inclusion and minimize or eliminate negative consequences (e.g., displacement) for Historically Disadvantaged Portlanders. An Equity Plan template for non-financial investments, which is attached as Appendix B of the Procedures, can be used to evaluate, plan, and address such disparities and opportunities.

**2.4 Community Benefits.** Projects receiving substantial investments through PDC shall be define explicit community benefits. PDC should enter into a community benefits agreement (a "CBA") to address issues of access for local residents to long-term employment opportunities and advancement, supply-chain opportunities for local businesses, and publicly-accessible amenities.

- 2.5 **Accountability.** The activities in sections 2.1, 2.2, 2.3, and 2.4 shall be reviewed and evaluated annually by the PDC Equity Council and PDC Executive Director to determine the effectiveness of PDC's equity approach and make recommendations for changes that more effectively foster effectiveness and public accountability.

### **PART THREE – CONTRACTING-BASED EQUITY PROGRAMS**

Part Three of these Procedures describes the equity programs implemented through certain public and public-private contracting activities. Where applicable, the activities and programs described in this section must align with PDC's policy and guidelines on sustainable purchasing. Questions on this section should be directed to PDC's Communications and Social Equity Director.

- 3.1 **Business Equity Program.** The goal of the Business Equity Program ("BEP") is to ensure that PDC's projects and programs provides professional, supplier, and construction contracting opportunities to Certified Firms (i.e., certified minority-owned businesses, women-owned businesses, disadvantaged businesses, and emerging small businesses). The BEP also encourages the participation of businesses owned by veterans on Direct Contracting, PDC Sponsored Projects, and on projects utilizing PDC Resources, including Intergovernmental Agreements.

3.1.1 **Applicability.** The BEP applies in any of the following types of agreements:

- A PDC Personal Services Contract for any amount
- A PDC-Owned Construction Contract with Hard Construction Costs greater than \$200,000
- A PDC Sponsored Project receiving more than \$300,000 of PDC Resources to support a project with Hard Construction Costs greater than \$200,000
- A sale of PDC real property to a private party with a purchase price greater than \$300,000 that is expected to involve Hard Construction Costs greater than \$200,000
- An Intergovernmental Agreement with Hard Construction Costs greater than \$200,000 and more than \$100,000 in PDC Resources, whether project is contracted by PDC or another agency. The Executive Director or the Executive Director's designee may defer to another agency's program if its program is similar to PDC's program. If PDC defers to another agency's program, utilization reports shall be provided to PDC by the other agency on a monthly basis.

3.1.2 **Utilization Goals for Certified Firms.** The following Utilization Goals are established for each fiscal year. The Executive Director is responsible for annually reviewing the Utilization Goals and is authorized to modify them, based on the results of such annual analysis:

- **Personal Services Contracts (PDC-Owned or Sponsored):** 20% of the total number of awarded Personal Services contracts and 20% of total value of Personal Services Contracts
- **Construction Contracts (PDC-Owned):** 20% of Hard Construction Costs on projects
- **Construction Contracts (PDC – IGA):** 20% of Hard Construction Costs on projects
- **Construction Projects (PDC-Sponsored):** 20% of Hard Construction Costs on projects that exceed \$200,000 as calculated by an analysis of availability and capacity of Certified Firms for the specific project



- **Flexible Service Contracts (PDC-Owned):** 25% of the total number of Flexible Services Contracts awarded and 25% of the total value of all Flexible Services Contracts
- 3.1.3 **Utilization Goals for Projects Already Underway.** In an instance where a party receives notification of PDC's approval of the availability of PDC Resources after it has expended funds on a project, started construction, or taken other action that would impair its ability to comply with the BEP, PDC (through the PDC project manager, with assistance from the Equity Coordinator) may negotiate a Certified Firm participation level that is reasonable and may provide technical assistance to achieve that negotiated Utilization Goal.
- 3.1.4 **Program Requirements.** The BEP is implemented in construction projects by applying Appendix C of these Procedures for PDC-Owned construction projects and Appendix D of these Procedures for applicable PDC-Sponsored Projects.
- 3.1.5 **Prompt Payment.** For construction projects subject to the BEP, the contracting entity which received funds from PDC shall, upon receipt and approval of a monthly pay application, promptly pay the general contractors who shall subsequently promptly pay all subcontractors and suppliers within ten (10) calendar days. This requirement shall be made a part of the relevant construction contract.
- 3.1.6 **Self-Performed Work.** For construction contracts not subject to ORS 279C.305 (e.g., Sponsored Projects and PDC-Owned alternative contracts), PDC encourages opportunities for smaller contractors and Certified Firms. Prime Contractors who intend to self-perform more than 10% of the trade work to complete a project or an entire Construction Specifications Institute (CSI) MasterFormat trade division (e.g., excluding superintendence, supervision, mobilization, etc.) will be required to have the written authorization of the Communications and Social Equity Director or their designee, who may approve a higher percentage based on the type, size, available subcontractors, and other relevant project criteria.
- 3.1.7 **Joint Ventures.** For large-scale and alternative contracting projects not subject to low bid requirements, PDC may provide incentives for joint ventures and mentor-protégé partnerships that enhance BEP goals (e.g., additional points in the RFP evaluation process).
- 3.1.8 **Coordinator.** At its discretion, PDC may require that PDC Sponsored Projects assign a Certified Firm coordinator to projects subject to the BEP.
- 3.1.9 **Alternatives to Low Bid.** Alternatives to low bid (e.g., Design/Build, Construction Manager/General Contractor) that may enhance BEP goals should be pursued when feasible on projects subject to the BEP.
- 3.1.10 **Disparity Study Findings.** Annually, PDC shall develop a strategy to close disparities identified in the 2011 disparity study. This report will be prepared by PDC's Communications and Social Equity Director (or his or her designee).
- 3.1.11 **Five-Year Requirement.** On all projects subject to the BEP, all subcontractors who perform more than \$100,000 of work shall be a signatory to a State of Oregon Bureau of Labor and Industries ("BOLI") approved apprenticeship training program that has (a) been in existence for five years or longer and (b) has produced graduates. The PDC

Communications and Social Equity Director (or his or her designee) will approve any exceptions to this requirement.

- 3.1.12 **Effective Date of Applying the BEP on Sponsored Projects.** The effective date for applying the BEP to current projects is the signing of the transactional documents between PDC and the developer. At the signing of a memorandum of understanding (MOU) between PDC and the developer, a preliminary determination shall be made by PDC of the applicability of the Policy. A final determination shall be made by PDC of the applicability of the Policy prior to the signing of the transactional documents between PDC and the developer.
- 3.1.13 **Ineligibility.** Contractors or subcontractors that are on the [BOLI list of ineligible contractors](#) cannot participate in PDC Owned or PDC – IGA construction projects.
- 3.1.14 **Insurance and Bonding.** For PDC Sponsored Projects subject to BEP, PDC may provide incentives for the owner/developer/prime contractor to reduce insurance and bonding barriers for Certified Firms.
- 3.2 **Workforce Equity Program.** The Workforce Equity Program (“WEP,” formerly the “Workforce Hiring and Training Program”) aims to maximize apprenticeship opportunities in the construction trades and ensure employment opportunities for People of Color and Women. The WEP also encourages the employment of veterans and people with disabilities on Direct Contracting, Land Transactions, and on work utilizing PDC Resources.
  - 3.2.1 **Applicability.** PDC-Owned Construction Contracts, PDC-Sponsored Projects, and PDC-Intergovernmental Agreements related to construction must comply with the WEP upon meeting any one of the following criteria:
    - On a PDC-Owned Construction Contract consisting of construction work greater than \$200,000, the WEP shall apply to the prime contractor and any subcontract(s) greater than \$100,000.
    - On a PDC-Sponsored Project consisting of construction, the WEP shall apply if the project receives \$300,000 or more of PDC Resources to support a project with a Hard Construction Cost greater than \$1,000,000 and shall apply to the prime contractor and any subcontract(s) greater than \$100,000.
    - A sale of PDC real property to a private party with a purchase price greater than \$300,000 that is expected to involve Hard Construction Costs greater than \$200,000
    - On a PDC-Intergovernmental Agreement consisting of construction work greater than \$200,000, the WEP shall apply to the prime contractor and any subcontract(s) greater than \$100,000. The PDC Executive Director (or designee) may defer to another agency’s workforce program if its program is similar to PDC’s program. If PDC defers to another agency’s program, utilization reports shall be provided to PDC by the other agency on a monthly basis.
    - The WEP does not apply to Personal Services, Flexible Services, and other services contracts or agreements not involving construction work.



**3.2.2 General Program Requirements.** Projects subject to the WEP shall:

- Ensure that a minimum of 20% of labor hours in each apprenticeable trade performed by the contractor and subcontractors are worked by state-registered apprentices. **(Mandatory)**
- Work toward achieving the following Workforce Diversity Goals as outlined in the table below. The percentage of hours set forth below includes both apprenticeship hours and journey level hours. **(Aspirational)**

Workforce Goals by Fiscal Year	2008/2009	2009/2010	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015	2015/2016	2016/2017	2017/2018
Female	6%	7%	8%	9%	10%	11%	12%	13%	14%	15%
People of Color	25.5%	26%	26.5%	27%	27.5%	28%	28.5%	29%	29.5%	30%

- Encourage the employment of veterans and people with disabilities. **(Aspirational)**
- Seek to employ a workforce that reflects the diversity of the City of Portland, including recruitment of a diverse workforce through the unions, the apprenticeship programs, and other community resources. **(Aspirational)**

**3.2.3 Applying Requirements for Projects Already Underway.** In an instance where a party receives notification of PDC's approval of the availability of PDC Resources after it has bid a project, expended funds on a project, started construction, or taken other action that would impair its ability to comply with the WEP, the PDC Project Manager, with assistance from the PDC Equity Coordinator, may negotiate a level of compliance that is reasonable and may provide technical assistance to achieve that negotiated Workforce Goal.

**3.2.4 Program Requirements.** The WEP is implemented in applicable construction projects by applying the Appendix E of these Procedures for both PDC-Owned and PDC-Sponsored Projects.

**3.2.5 Equal Employment Opportunity Certification.** Contractors and subcontractors subject to the WEP must be certified by the City of Portland as an Equal Employment Opportunity employer.

**3.2.6 Damages.** The requirements outlined in Section 3.2.2 are to be stipulated in PDC's agreements with a developer (for Sponsored Projects), another public agency (if the project is delivered through an Intergovernmental Agreement), or general contractor (if the project is owned by PDC). In the event that PDC determines, in its sole discretion, that the mandatory WEP requirements have not been substantially satisfied, subject to the terms of the applicable agreement, PDC's finding may result in one or more of the following actions:

- A finding of breach of the agreement with entity receiving funds with a notice to cure deficient performance;

- Excluding the entity, developer, contractor, or subcontractor from receiving future PDC Resources or bidding on future PDC solicitations subject to any other legal or procedural requirements;
  - A claim for liquidated damages with an assessment on the stipulated amount, to be reimbursed to PDC as the funding agency;
  - Withholding all or part of progress payments;
  - Any additional remedies included within the agreement.
- 3.3 **Enterprise Zone.** Effective on May 1, 2015, the BEP and WEP described above apply to PDC Enterprise Zone (“E-Zone”) projects that involve new buildings and structures to be constructed or new additions to or modifications of an existing building or structure. If construction has commenced on an E-Zone project but is not yet completed, then see Sections 3.1.3 and 3.2.3 above to determine the effective date in applying the BEP and WEP. If construction was initiated and completed on an E-Zone project after May 1, 2015 and before an E-Zone Authorization Application is submitted, then the E-Zone company will pay an additional two percent (2%) of its actual tax savings to PDC’s Workforce Training Business Development Fund.
- 3.4 **Exemptions.** The programs described in Part Three do not apply to the following: (a) projects as described in Section 3.3 that have submitted an E-Zone Authorization Application by April 31, 2015; (b) projects receiving PDC Resources derived from a financial assistance program that are intended to be used for working capital; (c) projects receiving federal funds when federal equity policies apply; (d) property acquisitions; or (e) other projects as deemed exempt by the PDC Executive Director after consultation with members of the Board.

#### **PART FOUR – HUMAN RESOURCES EQUITY PLAN**

Part Four of these Procedures describes the development, adoption, and implementation of a Human Resources Equity Plan (the “HR Equity Plan”). Questions on this section should be directed to PDC’s Human Resources Director.

PDC will research and document benchmarks and best practices of similar organizations with successful internal and staff-focused diversity and equity programs. The Human Resources division will subsequently develop, adopt, and implement an annual work plan to address education, training, and strategies to retain, promote, and recruit diverse staff reflective of the local community.

Goals of the HR Equity Plan will include:

4.1 **Retention.** To accomplish retention goals of the HR Equity Plan:

- PDC managers will be trained in cultural competency and awareness of institutional and unintentional bias that impacts organizational effectiveness;
- Employee performance evaluations will include accountabilities for cultural competency;
- Policies, practices, and procedures will be screened for institutional racism; and
- PDC will sponsor internal and external programs and educational opportunities to promote equity and inclusivity for all employees.



**4.2 Recruitment.** To accomplish the recruitment goals of the HR Equity Plan, PDC will:

- Collaborate with community equity partners to leverage diverse opportunities for recruitments and job postings;
- Report statistics and adhere to an Affirmative Action Plan ("AAP") that benchmarks local market diversity;
- Aspire to exceed the goals outlined in the AAP to be an employer of choice (i.e., an employment environment where employees choose to work due to the employer's superior practices, policies, benefits, and overall work conditions) in inclusiveness and equity within the broad population; and
- Consider all candidates who meet the minimum qualifications for all open positions, while encouraging candidates of color to apply and seek growth opportunities.

**4.3 Career Development.** To accomplish the career development goals of the HR Equity Plan, PDC will:

- Collaborate with individual employees to create development plans for all interested employees, including employees of color, in order to grow their careers within PDC;
- Develop opportunities and support for all employees, including employees of color, that will meet their particular career goals; and
- Promote mentorship opportunities for all interested employees, including employees of color, within PDC as part of individual development plans.

**4.4 Hiring Panel Diversity.** PDC will endeavor to create hiring and interview panels that are diverse in representation. To accomplish this, PDC may utilize the City of Portland's Minority Evaluator Program ("MEP") to identify and screen potential panel members.

## **PART FIVE – OTHER INTERNAL EQUITY MEASURES**

Part Five of these Procedures describes other internal equity actions taken by PDC. Questions on this section should be directed to PDC's Communications and Social Equity Director.

- 5.1 Equity Council.** The PDC Equity Council (or other body as designated by the Executive Director) will oversee internal equity practices, monitor organizational progress, increase cultural competency training, and make recommendations for performance improvement. The scope and purpose of the Equity Council will be define in a separate
- 5.2 Flexible Service Contractor Work Order Selection.** PDC project managers should take steps to fairly distribute work to all qualified service providers within a flexible service contract category. A general preference will be given to Certified Firms.

## **PART SIX – DEFINITIONS**

Capitalized terms in these Procedures have the following meanings:

**"Board"** means the PDC Board of Commissioners.

**"Business Equity Program"** means the program described in Section 3.1 of these Procedures.

**“Financial Assistance Programs”** means certain PDC business financial assistance programs, including, but not limited to, the Direct Tax Increment Loan, the Economic Development Administration (EDA) Revolving Loan and Real Estate Fund, and other programs the Executive Director may designate.

**“Certified Firms”** include Minority/Women/Emerging Small Business (M/W/ESB) firms as certified by the State of Oregon; or a Disadvantaged Business Enterprise (DBE) as certified by the U.S. Department of Transportation.

**“Communities of Color”** See People of Color.

**“Direct Contracting”** includes all professional, supplier, and construction services purchased directly by PDC (i.e., not through a developer, Intergovernmental Agreement, or any other third party).

**“Enterprise Zone”** is a five-year, 100% tax abatement program designed to encourage existing and new industrial firms to make new capital investments in certain designated areas. Participating firms are required to create or retain quality jobs while maximizing the economic benefits for residents of Portland who are currently earning at or below 80% Median Family Income.

**“Equity”** means everyone has access to opportunities necessary to satisfy their essential needs, advance their well-being, and achieve their full potential (see the [Portland Plan](#)).

**“Flexible Service Contract”** is a contract for services that has repetitive requirements on an as-needed basis and may include Personal Services Contracts.

**“Hard Construction Cost(s)”** are the costs to build improvements on a property, including all related construction labor and materials and fixed and built-in equipment costs. Costs not directly related to the construction of an improvement, such as overhead, administration, taxes, or other professional services such as architectural or engineering, are not considered Hard Construction Costs.

**“Historically Disadvantaged Portlanders”** are Persons of Color and people in Priority Neighborhoods.

**“Intergovernmental Agreement” or “IGA”** is an agreement between PDC and another government entity, including the City of Portland.

**“Land Transaction”** is the sale of real property by PDC at any price for the purpose of a private or public project.

**“PDC Activities”** refers broadly to PDC projects, programs, initiatives, and other actions that impact the local community.

**“PDC-Owned Construction Contract(s)”** include those in which PDC has a direct contractual relationship with the prime contractor and where PDC is the owner of the project.

**“PDC Resource(s)”** include: (i) PDC funds in the form of grants, loans, or payments (for purposes of calculating PDC Resources, any PDC funds used by a single entity for a single project in the form of grants, loans, or payments shall be combined to determine the total amount of PDC Resources); and (ii) the value of a Land Transaction (for purposes of calculating the value of a Land Transaction, the value shall be the difference between the appraised value of the property and its sale price).

**“PDC-Sponsored Project(s)”** include all projects that are privately owned and constructed involving PDC Resources, or a property conveyance that includes PDC Resources.

**“People of Color”** are people who self-identify as Black Americans, Hispanic Americans, Native Americans, Asian-Pacific Americans, Subcontinent Asian-Pacific Americans, and/or first generation immigrant populations for the purpose of minority business ownership. (*Singular: “Person of Color”*)

**“Personal Services Contract”** is a contract for specialized skills, knowledge or unique resources that involve the application of highly technical or scientific expertise or the exercise of professional, artistic, or management discretion or judgment. Such services include, but are not limited to, those performed by architects, engineers, surveyors, attorneys, auditors, other licensed professionals, artists, designers, computer programmers, consultants, and property managers.

**“Priority Neighborhoods”** are geographic areas in Portland that either (1) experience lagging commercial investment and increased or persistent poverty; or (2) experience gentrification pressures.

**“Utilization Goal(s)”** are percentage goals set for Certified Firms and workforce utilization on contracts and projects subject to the Policy.

**“Workforce Equity Program”** means the program described in Section 3.2 of these Procedures.

**“Workforce Goal(s)”** means the goals related to construction trades that utilize People of Color and Women as a percentage of total construction hours worked on a PDC-Sponsored Project.

---

**APPENDICES**

---

- A. Strategic Alignment and Equity Lens**
- B. Equity Plan for Non-Financial Investments**
- C. Business Equity Program Specifications – Direct Bid Process Requirements**
- D. Business Equity Program Specifications – Loan Agreement / Development Agreement Process Requirements**
- E. Workforce Equity Program Specifications**





## FIRST-SOURCE HIRING AGREEMENT

This First Source Agreement for referral of qualified job applicants is entered into between THE OREGON EMPLOYMENT DEPARTMENT, hereinafter referred to as the "CONTACT AGENCY," which coordinates job referrals for and represents the publicly funded job training fund administrator for Multnomah and Washington Counties WIB (Workforce Investment Board) WORKSYSTEMS, INC. and their training providers for the Portland Metro area covered in the Interagency Agreement under OAR 123-070-12100, hereinafter referred to as "PROVIDER", and the following business firm located in this geographic area, \_\_\_\_\_, hereinafter referred to as the 'EMPLOYER.'

The EMPLOYER is or will be receiving benefits from the following program or programs (check those that apply):

☐

Enterprise zone program: Specify **yes** or **no** - \_\_\_\_\_ if seeking an extended exemption period (up to five years)

☐

Other: specify \_\_\_\_\_.

Under this First Source Agreement, the EMPLOYER will use the CONTACT AGENCY as its first source for external referral of Qualified Applicants for all job openings of the EMPLOYER at the following location(s) \_\_\_\_\_, such that the EMPLOYER agrees to the following:

- To provide the EMPLOYER'S designated internal liaison, if they are not the APPROVED contract signer on this FSA Agreement, and who will serve as the single point of contact for communications with OED related to job openings. Employer will notify OED immediately of any change for this internal liaison.
- To effectively notify the CONTACT AGENCY of all job openings, no later than when notification is received by any other job referral source external to the EMPLOYER or any public announcement for the job opening, throughout the term of this agreement;
- That each such notice to the Contact Agency shall include job qualifications and a deadline for referrals;
- To ensure that the CONTACT AGENCY and the PROVIDERS will have:
 

Sufficient lead time (minimum lead time is 10 business days before the job application close date, except in temporary or emergency situations); and Complete information to make meaningful referrals for jobs that will be filled by the EMPLOYER;
- That all job information may be shared with all PROVIDERS for which referrals are coordinated by the CONTACT AGENCY; and
- That all job openings shall be listed in the PUBLIC LABOR EXCHANGE SYSTEM of the state Employment Department, insofar as a local office of that State agency is a PROVIDER.

- For purposes of this Agreement long-term jobs will be defined as those positions 180 days or more in duration. Jobs lasting less than 180 days will be considered temporary and will not be subject to the terms of this Agreement.
- Positions filled by internal transfers, promotions or recall of laid off employees on recall status will not be subject to the terms of this Agreement.

The CONTACT AGENCY agrees to the following:

- That to the extent Qualified Applicants are available among the relevant PROVIDERS, to refer those individuals to the EMPLOYER for job openings; and
- To facilitate and implement the listing of all job openings in the “PUBLIC LABOR EXCHANGE SYSTEM”, in cooperation with other PROVIDERS (though, not necessarily to the exclusion of other referral methods).
- To provide OED’s designated internal liaison, if they are not the APPROVED contract signer on this FSA Agreement, and who will serve as the single point of contact for communications with the EMPLOYER’S related to job openings.

The EMPLOYER agrees to:

- Fully consider for employment any Qualified Applicant referred by the CONTACT AGENCY by the referral deadline;
- Notify the CONTACT AGENCY when a Qualified Applicant is hired by the EMPLOYER; and
- Provide after-the-fact information to the CONTACT AGENCY about applicable overall hiring and job vacancies in a prescribed manner, or as requested by the Contact Agency, in accordance with [OAR 123-070-1900\(1\)](#) to (3).
- Comply with all relevant laws regarding employment of Qualified Applicants of this State or the Federal Government, including but not limited to not discriminating on the basis of race, color, religion, ancestry, national origin, political affiliation, sex, age, marital status, sexual orientation, physical or mental disability, or any other reason prohibited by such laws.

The EMPLOYER will make all final decisions on hiring new employees. After the EMPLOYER has hired the employees, the EMPLOYER assumes full responsibility for them as employees.

All persons hired under this Agreement are subject to the EMPLOYER's regular personnel policies and procedures and have no special or additional rights arising from this Agreement.

If the terms of this Agreement conflict with the provisions of a collective bargaining agreement to which the EMPLOYER is a party, the bargaining agreement shall prevail.



Both the CONTACT AGENCY and EMPLOYER agree to attempt to resolve all areas of misunderstanding, disagreement or dissatisfaction with each other as soon as they arise. If the parties are unable to resolve the issue, either may:

Initiate a meeting between the EMPLOYER and either the CONTACT AGENCY all of the PROVIDERS; the Portland Development Commission; or

Request assistance from the Oregon Economic and Community Development Department.

This agreement shall take effect on the date of the last signature by the contracting parties below, and shall be in full force and effect until DECEMBER 31 OF THE LAST YEAR OF THE EXEMPTION PERIOD (for Enterprise Zone Businesses) or, until the end of the term, period or periods as described in [OAR 123-070-1600](#)

---

APPROVING PARTIES CONTACT AGENCY

By: Oregon Employment Department

Name: Cynthia Mullen  
 Title: Office Manager  
 Address: 30 N. Webster, Suite E  
 Portland, OR 97217  
 Phone: 503.280.6051 FAX 503.280.6015  
 Email: [Cynthia.M.Mullen@state.or.us](mailto:Cynthia.M.Mullen@state.or.us)

Signature \_\_\_\_\_  
 Date \_\_\_\_\_

EMPLOYER

By:  
 Federal Employer Identification Number \_\_\_\_\_ - \_\_\_\_\_  
 (FEIN; 9 digit number that the IRS assigns to business entities)  
 State Business Identification Number \_\_\_\_\_  
 (BIN; Unemployment Insurance Account Number)

Name: \_\_\_\_\_  
 Title: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 Phone: \_\_\_\_\_.\_\_\_\_\_.\_\_\_\_\_ FAX \_\_\_\_\_.\_\_\_\_\_.\_\_\_\_\_  
 Email: \_\_\_\_\_

Signature \_\_\_\_\_  
 Date \_\_\_\_\_

---

OED INTERNAL LIAISON

Name: Debora A. Rock  
 Address: 30 N. Webster, Suite E  
 Portland, OR 97217  
 Title: Business Service Representative  
 Phone: 503.280.6057  
 Email: [Debora.A.Rock@state.or.us](mailto:Debora.A.Rock@state.or.us)

EMPLOYER INTERNAL LIAISON

Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 (Current; Physical)  
 Title: \_\_\_\_\_  
 Phone: \_\_\_\_\_.\_\_\_\_\_.\_\_\_\_\_  
 Email: \_\_\_\_\_

# Portland Enterprise Zone Authorization Checklist and Timeline

## Portland E-Zone Authorization Checklist\*

### 1 – Mandatory Pre-Consultation

- ☐ E-Zone staff verifies with company that property is within the E-Zone boundary and investment is eligible.
- ☐ Company provides E-Zone staff with hiring and investment estimates, and confirms specific address.
- ☐ E-Zone staff provides spreadsheet with estimated company benefit and E-Zone requirements to company.
- ☐ Mandatory Preauthorization Consultation takes place between E-Zone staff, county, and company.

### 2 – Application submittal

- ☐ Company submits completed E-Zone Authorization Application and the application fee.
- ☐ Receipt of application fee activates the application intake process at the PDC.
- ☐ E-Zone staff confirms the primary point-of-contact with company.

### 3 – Written Agreement

- ☐ PDC and company work together to draft the Written Agreement.
- ☐ Final Written Agreement is reviewed by PDC's legal department and PDC's Executive Director executes two copies.
- ☐ Company signs both copies of the Written Agreement.
- ☐ Company retains one copy of signed Written Agreement for the record and returns the other to PDC.

### 4 – First Source Hiring Agreement (FSA)

- ☐ PDC sends FSA contract (electronically) to be completed by the company.
- ☐ Company executes the FSA and returns it to PDC staff within 30 days.
- ☐ PDC sends FSA to WorkSource Oregon Employment Department.
- ☐ WorkSource Oregon will execute the FSA contract and return copy to company.

### 5 – Procurement Plan

- ☐ E-Zone staff provides company with Procurement Plan template.
- ☐ Company submits Procurement Plan to PDC.
- ☐ E-Zone staff approves Procurement Plan within 60 days of company's submission.

### 6 – Authorization Approval

- ☐ Authorization Approval form is executed by the PDC and the Multnomah County Tax Assessor's office.
- ☐ The following parties are notified of the company's Authorization Approval:
  - Authorized E-Zone applicant
  - Multnomah County Tax Assessor's Office
  - Oregon Department of Revenue
  - WorkSystems, Inc.
  - Worksource Oregon Employment Department
  - Oregon Economic and Community Development Department

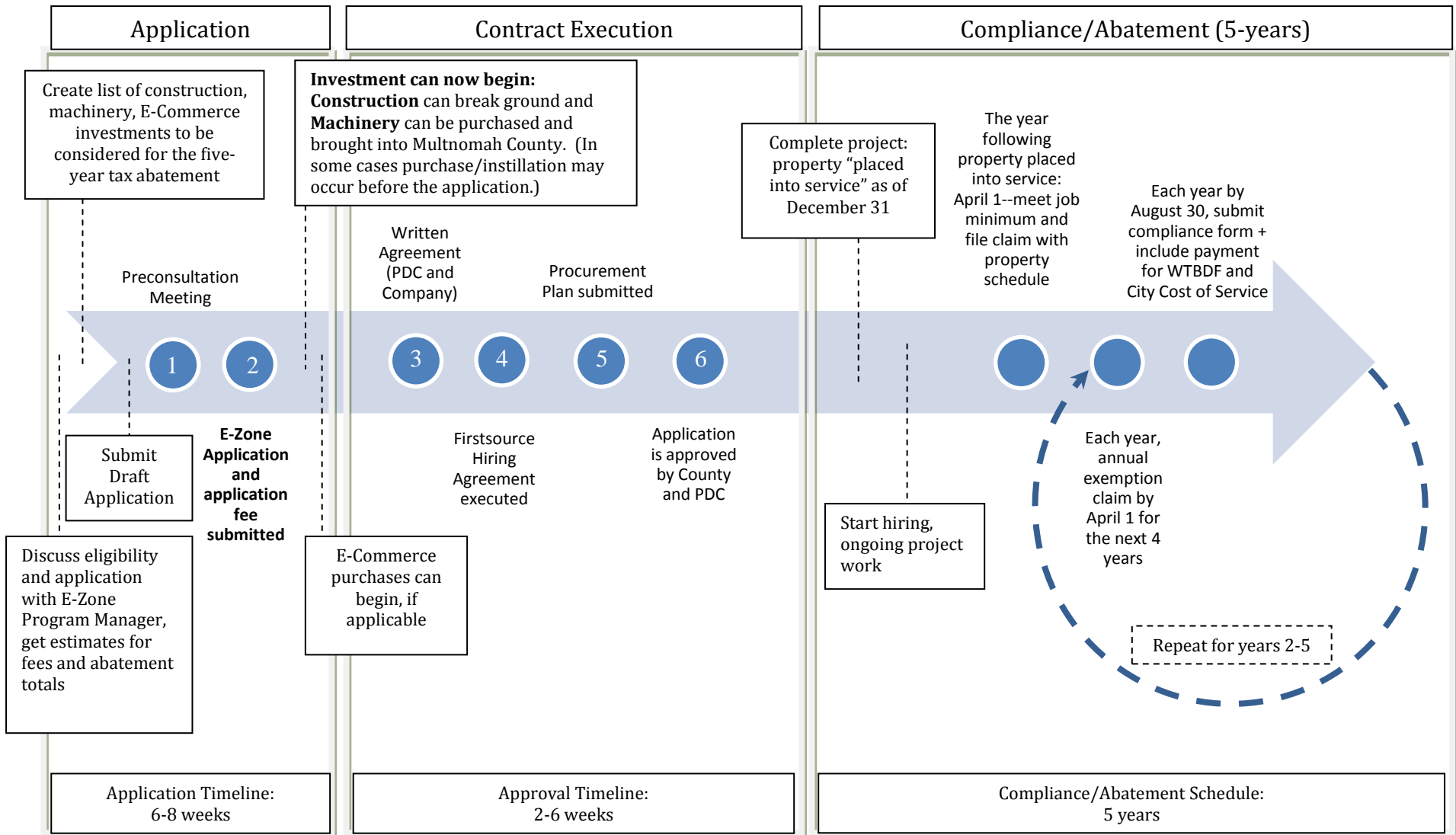
#### How do I get started?

Contact Andy Reed,  
E-Zone Program Manager:  
503-823-7053 or  
reeda@pdc.us

\* Numbers 1-6 on the  
Checklist correspond  
to numbers 1-6 on the  
Timeline.

# Portland Enterprise Zone Authorization Checklist and Timeline

## Portland E-Zone Timeline





benjamin barber &lt;starworks5@gmail.com&gt;

---

**follow up**

2 messages

---

**Julie DeBuhr** <jdebuhr@newrelic.com>

Wed, Jan 28, 2015 at 10:26 AM

To: barberb@barberb.com

Benjamin,

I wanted to ensure that I had the correct contact information for you. I am still working on the follow up to our conversation on Monday night.

I'll be talking to you soon.

Julie

---

**benjamin barber** <barberb@barberb.com>

Wed, Jan 28, 2015 at 11:52 AM

To: Julie DeBuhr &lt;jdebuhr@newrelic.com&gt;

I could save you the legalese and be straight with you.

I don't care about money, I care about principals.

I am very able to prove that I am right.

And the event that occurred was wrong.

So just find some way to make it better.

Something that would demonstrate commitment to the law.

[Quoted text hidden]

**ODE RFP – STEM, STEAM and/or CTE Program and Activity Grant**

**Project Summary:** The Girls Inc. SMART (science, math and relevant technology) Initiative addresses the following goals: extend the reach and impact of our STEM programming; strengthen girls’ academic success and post-secondary readiness; inspire girls to adopt more positive aspirations for their futures; deepen family involvement; and continuously improve our program quality and cultural responsiveness. This investment will enable us to serve more Girls Groups with impactful STEM experiences and launch our comprehensive Eureka! Program which engages older girls in exciting year round STEM learning, post-secondary preparation and career connections. Based on our track record, we anticipate that 65% of our participants will increase their knowledge of STEM subject matter, pro-social behavior and self-confidence. Key partners include numerous K-12 schools, STEM businesses and associations, as well as local colleges and universities.

**Project Rationale:** Girls Inc. of NW Oregon recognizes multiple barriers to girls’ personal and academic success in our community, and their achievement and interest in STEM fields/careers. Our participant profile for the 2012-2013 program cycle reflected high racial and ethnic diversity with girls identifying as follows: Asian (4%); Black/African American (17%); Latina (30%); Native American/Alaska Native (7%); Mixed-Race (7%); Other (7%); White (24%).

*Socioeconomic:* In the past decade the percentage of students of color in the Portland Metro area increased significantly and many of these youth and their families have faced barriers linked with high poverty. Further, Portland students who qualify for the free or reduced-price lunch program increased from less than half to the majority of students in four of the five districts. At the same time, investments in girls of color targeted to advance their personal and academic achievement have not kept pace. Underserved girls’ access to role models and mentors

through local programs, particularly in STEM fields, are limited to non-existent. White girls are much more likely to know someone in a STEM career, compared to African American and Hispanic girls (Girl Scout Research Institute, 2012). A mere 2.4% of advanced degrees in STEM fields are held by women of color (National Science Foundation, 2012). Given that many schools continue to be under resourced, out-of-school time providers are uniquely positioned to create and extend STEM meaningful connections for youth.

*Academic Achievement:* Research shows that girls make determinations about their math and science aptitude as early as 2<sup>nd</sup> and 3<sup>rd</sup> grade. Between 4<sup>th</sup> and 8<sup>th</sup> grade, more girls than boys begin to turn away from STEM subjects due to developing fixed mindsets about their ability. The issue is not just about curiosity, but also confidence in the skills needed to do the work. This is a critical transition time for the development of future career aspirations of youth generally (Maltese & Tai, 2010), and girls specifically (Wigfield et al, 1991). It is a prime moment to influence girls' self-efficacy, associated with academic achievement and a selection of STEM related college and career choices (Britner & Pajares, 2006). National Assessment of Educational Progress (NAEP) scores show that 33% and 35% of Oregon's eighth graders test at or above proficient in math and science, respectively. SAT scores in mathematics remain lower for girls than boys. Of teens surveyed, 7% of girls intended to work in science, engineering, and technology, compared to 17% of boys (Marlino & Wilson, 2003). These achievement gaps along with the challenge of increasing the graduation rate for minority students, point out that girls are less likely to be prepared to enter STEM-related post-secondary education and training leading to well-paying jobs in STEM fields (Portland Metro STEM Partnership, Executive Summary April 2012).



*Gender:* Assumptions about the distinct abilities and interests of boys and girls plus persistent structural inequity limit girls' access to opportunities. Girls Inc. plays a key role in reducing socioeconomic and racial inequities that at-risk, low-income, highly diverse girls have inherited, all challenges which we know affect student success, by engaging them in quality learning experiences designed to create a safe, girl space where they can talk about their challenges, gain new skills and knowledge, adopt and practice more pro-social behaviors, and improve self-confidence.

*STEM:* Nine of the 10 fastest growing occupations requiring at least a bachelor's degree will involve substantial mathematical or scientific training (US Department of Labor, 2009). Women, however, hold only about 25% of the positions in STEM related fields (National Science Board, 2008). In Oregon, employment in STEM careers, such as healthcare, engineering and technology, is expected to grow up to 10% in the next five years and the median rate of hourly pay for STEM workers is twice that of all workers (Oregon Employment Department, 2009). In the absence of intentional and authentic STEM connections, data show that too few girls are translating math and science academic achievement into choosing STEM post-secondary and career directions that will increase their access job security and higher wages. Motivating more girls to choose STEM related post-secondary and career options along with persisting with attaining academic achievement are more critical goals than ever (AAUW, 2010).

**Project Plan:** Girls Inc. seeks funding to expand our SMART (science, math, and relevant technology) Initiative, including quality STEM focused after-school Girls Groups and year-round Eureka! Program STEM experiences for older girls. We will deliver SMART programming to 35 after-school Girls Groups and launch the year round Eureka! Program.

*STEM Girls Groups:* Groups engage 10-15 girls, ages 6 to 18, from no more than two consecutive grades and explore one curriculum each term during 90 minute weekly meetings (three terms each school year). Trained facilitators who lead the groups are drawn from a diverse and dynamic base of volunteers and serve as positive, professional, female adult role models to girls. Our developmentally appropriate, research based STEM curricula are designed with the specific needs of girls in mind and integrate post-secondary and career connections. Girls Inc. staff coordinate closely with school principals, counselors, teachers, and Schools Uniting Neighborhoods (SUN) partners to sequence curriculum so that it is relevant and interesting for participants.

*Eureka! Program:* This is a five-year effort to connect older girls, many who will be first generation college or university applicants, to intensive summer and school year experiences that augment and sustain the skills, tools and self-efficacy developed in Girls Groups. From the summer before 8<sup>th</sup> grade through graduation, girls access programming and mentoring aimed at increasing their motivation to succeed academically, graduate on time and choose post-secondary options that prepare them for STEM-related careers. The program is a community wide effort that thrives on partnerships and interactions with schools, community-based organizations and local businesses and corporations enabling Girls Inc. to link girls to meaningful experiences such as Guest Speakers, Field Trips and internships.

*Target Population:* We will serve 350 girls ages 7-18 in STEM Girls Groups with 30 of these girls (entering 8th grade) participating in the Eureka! Program (50% of participants will be racial and/or ethnic minorities or multicultural with 80% will be eligible for free and reduced lunch).

*Delivery and Staffing:* Our Program Director, Karin Malbrough, has more than 15 years of experience designing, implementing and evaluating youth programs. She has explored the intersection between race, ethnicity, gender, class, and culture as they all influence youth's positive identity formation and thriving. Funding will support a new STEM Coordinator position (.75 FTE) to oversee STEM Girls Groups, recruit Eureka! Program participants, refine STEM program offerings with partners, and organize exciting Guest Speaker plus Field Trip opportunities. Facilitators come from a range of personal and professional backgrounds, all are experienced with underserved and underrepresented youth from diverse communities. When recruiting, we intentionally advertise in spaces accessed by racially and ethnically diverse youth development practitioners and other professionals of color, including networks respected by communities of color. We also carefully place Facilitators with whom participants' can identify.

*Partnership Details:* The Eureka! Program model leverages key local partnerships with unique and fun models, such as ChickTech, a non-profit dedicated to increasing the number of women and girls pursuing technology-based careers and retaining women in the technology workforce, and Saturday Academy. Other committed partners interested in providing space, instructors, and in-kind resources to support STEM programming areas like engineering and digital arts include SUN site partners, Portland Community College, Portland State University, and the Oregon Museum of Science and Industry.

Our Executive Director Elizabeth Nye represents Girls Inc. on a number of committees dedicated to building cultural competency and community connection, such as the Coalition of Advocates for Equal Access for Girls. Girls Inc. is also connected to the Portland Metro STEM Partnership, the East Metro STEAM Partnership, and the Oregon Girls Collaborative. In 2012 we launched our STEM Advisory Council made up of professional women in STEM fields and advocates for

STEM education. Advisory Council objectives include: implementing the Eureka! Program; broadening our STEM partnerships with SMART stakeholders; expanding our network of collaborators and supporters; and increasing grant funds to support all of these efforts.

**Evaluation Plan:** We take a comprehensive approach to measuring outcomes and improving program quality. We collect demographic, attendance and outcomes information for all participants. We administer anonymous pre and post surveys for each term which are designed to measure change on specific outcomes that are related to curriculum and that are predictors of girls' improved academic performance and engagement. Based on our proven track-record, we anticipate that 65% of participants will demonstrate gains in knowledge, pro-social behavior and self-confidence. Year to year, we have continued to meet or exceed program evaluation benchmarks.

**Sustainability Plan:** As an affiliate of the national organization Girls Incorporated, we are connected with a national network that shares learning and best practices. At the 2010 Clinton Global Initiative, Girls Inc. made a commitment to engage more underserved girls and young women through the Eureka! Program. The national organization is now actively raising funds to support Eureka! efforts across the country. To stay at the forefront of gender-specific programming locally, we have made strategic investments in increasing the focus we place on connecting girls to STEM opportunities. Furthermore, our partner network creates a strong infrastructure to support this effort. With support from ODE, we will be able to build out our extended STEM programming over the next two years. This work will include anticipated confirmation of corporate support from Intel, Tektronix, HP, Girls Inc. nationally and others. Finally, we are confident that the work of the STEM Advisory Council will yield ample financial and in-kind support to sustain these activities beyond the grant period.

# Oregon's On-Time High School Graduation Rate Shows Strong Growth in 2014-15

Oregon continues to make gains in its on-time high school graduation rate.<sup>1</sup> The rate increased to 74% for the 2014-15 school year—up from 72% the year before.

The graduation rate for almost all student groups rose, led by Hispanic students (2.4 percentage points) and Black students (2.4 percentage points). The rate for economically disadvantaged students also showed a substantial increase—rising by 2.2 percentage points—but the gap for those students, compared to their counterparts from more affluent families, is still substantial.<sup>2</sup>

## Exhibit 1: Change in Graduation Rates By Student Group

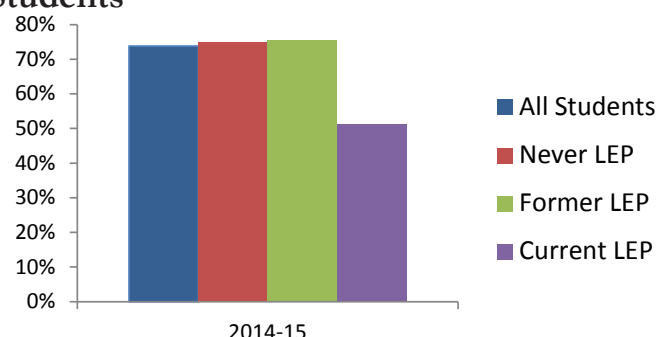
	2013-14	2014-15	Change
<b>All Students</b>	<b>72.0%</b>	<b>73.8%</b>	<b>1.8%</b>
<b>Males</b>	<b>68.0%</b>	<b>70.1%</b>	<b>2.1%</b>
<b>Females</b>	<b>76.2%</b>	<b>77.8%</b>	<b>1.5%</b>
<b>American Indian/Alaska Native</b>	<b>53.5%</b>	<b>55.0%</b>	<b>1.4%</b>
<b>Asian</b>	<b>85.9%</b>	<b>87.5%</b>	<b>1.6%</b>
<b>Native Hawaiian/Pacific Islander</b>	<b>68.8%</b>	<b>63.2%</b>	<b>-5.6%</b>
<b>Black</b>	<b>60.2%</b>	<b>62.6%</b>	<b>2.4%</b>
<b>Hispanic</b>	<b>64.9%</b>	<b>67.4%</b>	<b>2.4%</b>
<b>White</b>	<b>74.2%</b>	<b>76.0%</b>	<b>1.8%</b>
<b>Multi-Ethnic</b>	<b>69.8%</b>	<b>72.7%</b>	<b>2.9%</b>
<b>Economically Disadvantaged</b>	<b>64.2%</b>	<b>66.4%</b>	<b>2.2%</b>
<b>Not Economically Disadvantaged</b>	<b>81.4%</b>	<b>83.3%</b>	<b>1.9%</b>
<b>Current Limited English Proficient</b>	<b>51.7%</b>	<b>51.2%</b>	<b>-0.5%</b>
<b>Former Limited English Proficient</b>	<b>74.9%</b>	<b>75.3%</b>	<b>0.5%</b>
<b>Never Limited English Proficient</b>	<b>73.1%</b>	<b>75.0%</b>	<b>1.8%</b>
<b>Students with Disabilities</b>	<b>51.1%</b>	<b>52.7%</b>	<b>1.6%</b>
<b>Students without Disabilities</b>	<b>75.3%</b>	<b>77.3%</b>	<b>2.0%</b>
<b>Talented and Gifted</b>	<b>92.4%</b>	<b>93.2%</b>	<b>0.9%</b>
<b>Not Talented and Gifted</b>	<b>69.8%</b>	<b>71.8%</b>	<b>2.0%</b>

<sup>1</sup> On-time graduation is defined as students who graduate within four years of entering high school.

<sup>2</sup> Economically disadvantaged students are those who qualify for free or reduced-price lunches under the U.S. Department of Agriculture's National School Lunch Program.

Only two student groups saw a decline in on-time graduation rates this year: Native Hawaiian/Pacific Islander students and those English Language Learners who had not achieved English proficiency by the time they entered high school (current Limited English Proficient (LEP) students). Native Hawaiian/Pacific Islanders constitute a very small group of students and its graduation rate has had quite a bit of variation over the years. The rate for current LEP students fell by 0.5 percentage points, from 51.7% to 51.2%. The number of students in this group, however, has been falling rapidly, declining 16% from last year and by 55% since 2008-09. Former Limited English Proficient students—those who achieved English proficiency prior to entering high school—graduate at much higher rates (75.3% in 2014-15); higher than the rate for all students and higher even than the rate for students whose first language is English.

## Exhibit 2: LEP Students Compared to All Students

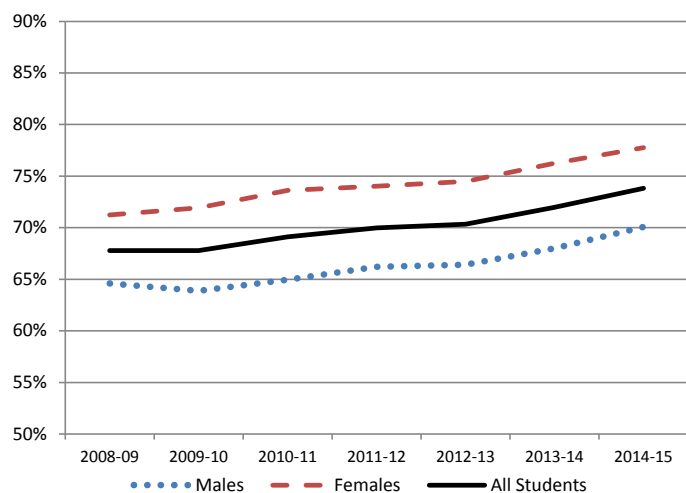


## Significant Growth But Gaps Remain

Exhibit 3 on the next page shows the trends in graduation rates for all students and by gender since the cohort graduation rates were first calculated in 2008-09.<sup>3</sup> The overall rate increased by over six percentage points over the 7-year period, with gains made in every year. While the rates for both male and female students showed steady growth, the gender gap has remained essentially unchanged.

<sup>3</sup> Starting in 2013-14, in addition to students receiving regular diplomas, the rate includes students receiving modified diplomas and students who earned their diplomas but had not yet received them because they were returning for a 5th year of high school to earn college credits. To create greater comparability, we have adjusted the data prior to 13-14 to include modified diplomas, but we do not have data for 5th-year students prior to 13-14 to make that adjustment.

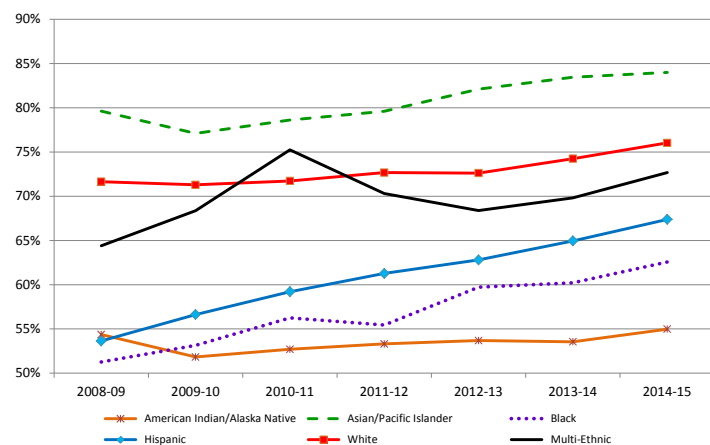
### Exhibit 3: Trends in Graduation Rates - All Students and by Gender



Other analysis by the Department of Education has shown that males, even when they perform as well on state tests of math and reading as females, still graduate at a significantly lower rate.<sup>4</sup> This suggests factors other than academics present larger barriers to graduation for males than for females.

While nearly all student groups experienced growth in their graduation rate, significant gaps remain. Exhibit 4 highlights gaps among racial and ethnic groups. American Indian/Alaska Native students trail their peers in both their actual graduation rate and in growth. Rates for Black and Hispanic students have shown the greatest sustained growth, but they also still trail their peers. Asian and White students have the highest rates relative to other racial and ethnic groups.

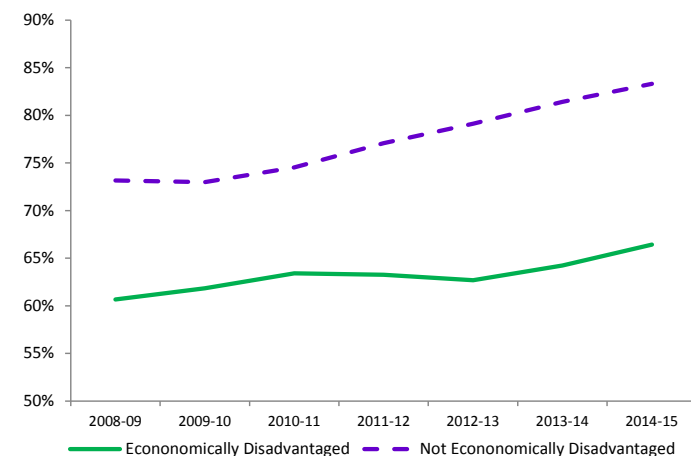
### Exhibit 4: Trends in Graduation Rates by Race and Ethnicity



The number of students in the multi-racial group has grown very rapidly with recent changes in the federal ethnicity reporting rules, and the graduation rate for that group has been somewhat variable.

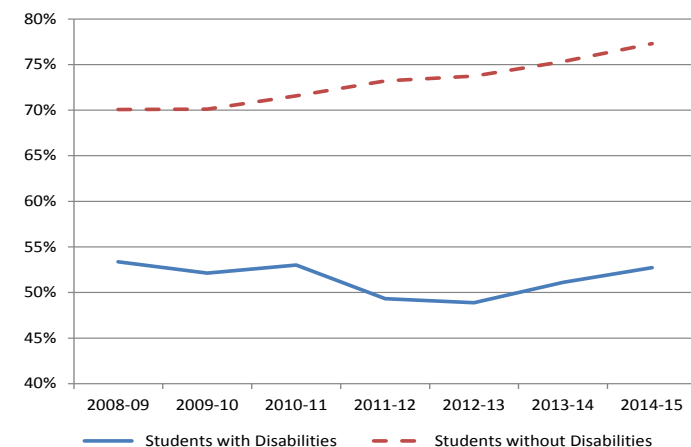
Gaps among other student groups remain as well. Exhibit 5 shows graduation rates by economic status. Although the rates have been increasing for both groups, the gap for economically disadvantaged students is particularly concerning because the share of students in this category is increasing and the gap is very large—nearly seventeen percentage points in 2014-15—and has increased over time.

### Exhibit 5: Trends in Graduation Rates by Economic Status



Students with disabilities face unique challenges in completing high school relative to their classmates. Exhibit 6 shows they graduate on time at rates considerably lower than students without disabilities.

### Exhibit 6: Trends in Graduation Rates by Disability Status



<sup>4</sup> [Quality Education Model Final Report, August 2014, pp. 45-50.](#)



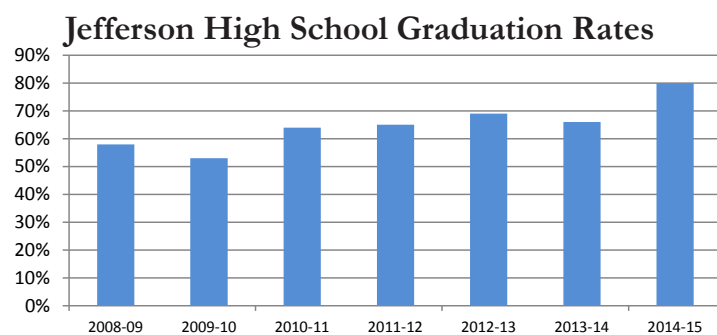
## Examples of Success from the Field

ODE staff spoke with principals from seven Oregon high schools that have significantly improved their graduation rates or reduced the graduation gap between student groups: Jefferson High School in Portland, Newport High School, North Medford High School, David Douglas High School in east Portland, Neah-Kah-Nie High School in Rockaway Beach, Rainier Jr/Sr High School, and Gervais High School. We also spoke with Superintendent Charles Ransom about the success of the high schools in the Woodburn School District. Each school has a unique story to tell about how it has created its success, but some common threads emerge:

- A shared vision among students and staff that all students can succeed
- Close connections between staff and students that create a positive school climate
- A focus on college and career goals that emphasizes high school success as a path to later success
- Partnerships with community colleges/universities and community organizations
- Individualized attention and early intervention for students falling behind

### Jefferson High School—Portland Public Schools

Jefferson High School increased its on-time graduation rate from 66% in 2013-14 to 80% in 2014-15, with increases for almost every student group. Principal Margaret Calvert attributes their success to her staff's ownership for student success, a focus on college-level coursework for all students, and close partnerships with Portland Community College, Portland State University, and Self Enhancement, Inc., a Portland non-profit supporting historically underserved youth.



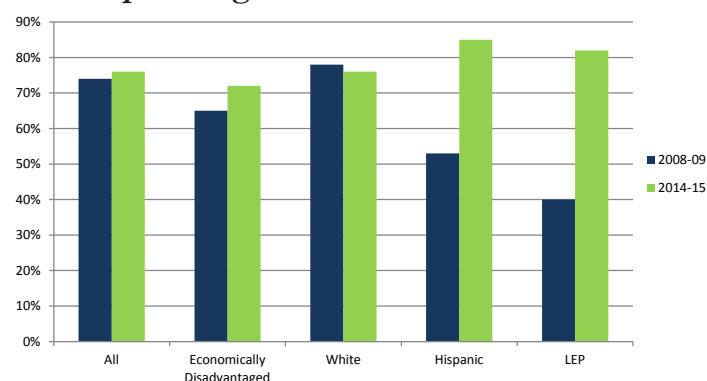
In 2011-12, Jefferson adopted a “Middle College” approach that promotes a college-going focus for all students. The school scaled up its partnership with Portland Community College, going from 10% to 100% of students participating. According to Principal Calvert, Jefferson has reached a “tipping point” where a shared commitment to success and an ethic of excellence and hard work have taken over the school. The partnership with Portland Community College has helped students navigate the higher education environment more effectively once they enter college. The class of 2014-15 is the first to spend all four years of high school under the new program.

### Newport High School—Lincoln County SD

Newport High School has almost entirely eliminated the graduation rate gap among its student groups. In 2008-09, Hispanic students had a graduation rate of 53%, 25 percentage points lower than for White students. Economically disadvantaged students had a rate of 65%, and Limited English Proficient students, 40%. By 2014-15, these gaps are gone, with Hispanic and LEP students outperforming their White peers.

Newport Principal Jon Zagel attributes Newport's success to a culture that engages all students and promotes three values the school calls “The Cub Way”: a Growth Mindset, a focus on Achievement, and an emphasis on Character. School staff is committed to students both inside and outside of school, and the school intervenes early when students are struggling. As Hispanic students increased from 8% of the student cohort in 2008-09 to 24% in 2014-15, there were struggles helping all students integrate into the school culture, according to Principal Zagel. That changed over the past few years, and the result is dramatically higher graduation rates for Hispanic and Limited English Proficient students.

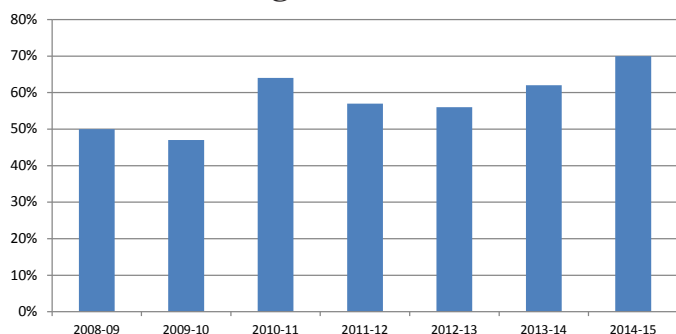
### Newport High School Graduation Rates



### North Medford High School—Medford SD

North Medford raised the graduation rate for its Limited English Proficient students by 8 percentage points from 2013-14 and by 20 percentage points since 2008-09. Perhaps more importantly, a growing share of English Learners (EL) are becoming proficient in English prior to entering high school and those students are graduating at even higher rates: 97% in 2014-15. That success may be the result of North Medford working closely with its primary feeder school—Hedrick Middle School—to better prepare students for the transition to high school.

#### North Medford High School Graduation Rates



North Medford connects with Hispanic students and promotes a college-going culture in multiple ways: Heritage Spanish classes where Spanish-speaking students can earn college credit, parent outreach for the families of EL students, parent nights where parents play an integral role in planning the meetings, and field trips to nearby community colleges and universities to introduce students to college culture. Many of these activities are led by Cesar Flores, a graduate of nearby Phoenix High, who now works at North Medford and was the first in his family to graduate from college.

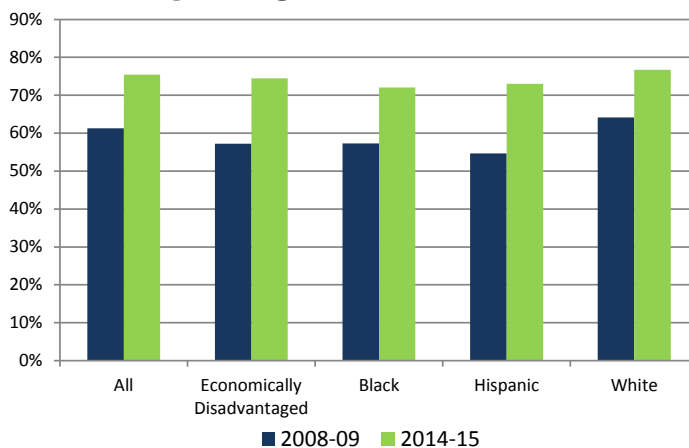
### David Douglas High School—David Douglas SD

Six years ago, staff at David Douglas set an ambitious goal: increase graduation rates 2% a year. By 2025, staff are striving for a 100% graduation rate. The total student graduation rate has increased from 61% in 2008-09 to 75% in 2014-15, a 14 percentage point gain that puts the school well on its way to achieving its goal. Nearly all student groups made progress during this period, including African American students who increased their rate from 57% to 72% and Hispanic students who increased their rate from 55% to 73%.

Principal John Bier attributes the increase in graduation rates to a multi-faceted approach rooted in two central values:

- Staff who go above and beyond in developing relationships with students.
- High academic and behavioral standards for all students.

#### David Douglas High School Graduation Rates



Bier characterizes his staff as being an innovative group of people who aren't afraid of taking risks. He specifically highlighted the efforts for Etema Banks, the African American Student Liaison, who has made a huge difference by connecting with Black students and promoting a college-going culture.

From a full-day tutoring center, to an after-school activity bus, to focusing on attendance, David Douglas is working on increasing graduation rates from multiple angles. Each effort has the potential to make a student's experience more individualized. To Bier, the more individualized the student experience can be, the better.

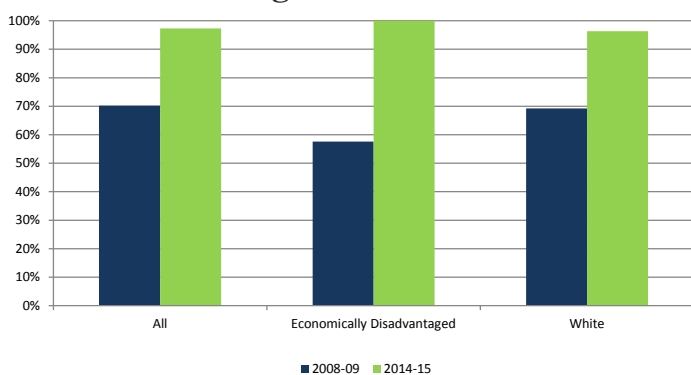
### Neah-Kah-Nie High School—Neah-Kah-Nie SD

Neah-Kah-Nie's graduation rate has increased from 70% in 2008-09 to 97% in 2014-15. For economically disadvantaged students, the gain is even greater. The graduation rate for students in this category rose from 58% to 100% over the same time period.

Principal Heidi Buckmaster attributes the improvement to continuing efforts by the entire staff at Neah-Kah-Nie. She said the goal is always 100% graduation. A major piece of accomplishing this goal is the close relationships her staff have with each student. Given the small size of the school, staff are able to get to know students on a personal level. Not only do they know where students are academically, but they know things like where their students want to go to college.

Buckmaster also attributes the school's success to high academic standards and a college-going culture. Students are required to earn 28 credits to graduate, 4 more than the typical requirement for an Oregon high school. Students are supported academically in a variety of ways, including through their advisory class, a class led by the same teacher throughout each student's high school career. The class provides academic support and is also a place where teachers start the college planning process with students.

### Neah-Kah-Nie High School Graduation Rates



Neah-Kah-Nie has many initiatives in place to help students succeed. Buckmaster says a large part of the success is the staff's ability to align those efforts and provide a nurturing environment for students to help them succeed.

### Rainier Jr/Sr High School— Rainier SD

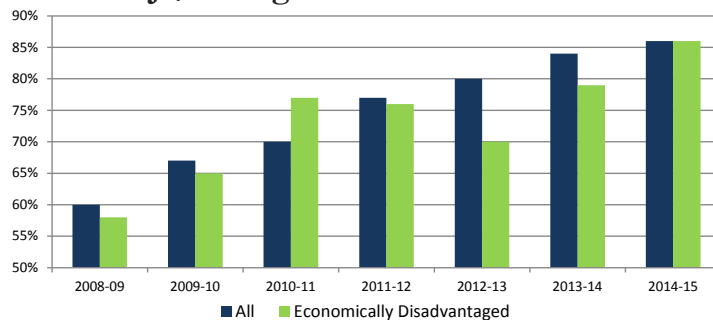
Rainier has experienced a big decline in enrollment as the community was hit hard by the economic recession. The 12th grade cohort fell from 133 students in 2008-09 to 57 in 2014-15. Over that period, despite cuts in funding due to the enrollment plunge, Rainier increased its graduation rate from 60% to 86%, and its rate for economically disadvantaged students from 58% to 86%.

Rainier co-principals Melissa Sandven and Graden Blue attribute much of Rainier's success to dedicated staff who push students to look beyond high school to what comes next. Staff, and posters in every classroom, regularly ask students "Where are you going to college?" Each student has a four-year education plan to guide them, and as the high school program becomes more integrated with the middle school program, those plans will become six-year plans.

The small size of the school allows closer attention to individual student needs and more effective interventions and one-on-one time. Regular professional development and time carved out for teacher collaboration are keys to meeting individual student needs.

According to Sandven and Blue, the school board and district administration have given the school the freedom to try new ideas and enough time to let those ideas fully develop. They recently have implemented a proficiency-based teaching and grading system, a change proposed by teachers and adopted by a group decision. The school has also developed a set of common expectations for all students and a set of common instructional strategies that create a consistency across classrooms that has improved student learning.

### Rainier Jr/Sr High School Graduation Rates



### Gervais High School— Gervais SD

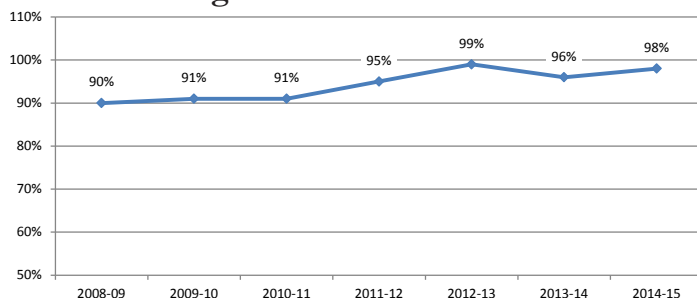
Gervais' graduation rate has remained at 90% or higher since 2008-09 and topped 97% for the 2014-15 school year. The school's economically disadvantaged, Hispanic, and English Learner (EL) student groups show similarly high graduation rates.

Principal Mike Solem talks with pride about the culture at Gervais. He and his staff take extra effort to not only make sure students feel safe and comfortable, but to celebrate student successes often. For example, the school holds monthly assemblies that highlight student excellence. Staff are also able to form close relationships with students and families given the small size of the school. Solem remarked, "At Gervais, you are not a number, you are a name."

He and his staff focus on three areas to keep students on track: attendance, behavior, and academics. In 2013, the school was honored as a MetLife Foundation-NASSP

Breakthrough School for its progress in academic achievement. He credits this growth in achievement in part to his staff who try to maximize the achievement of every student.

### Gervais High School Graduation Rates



Solem and his staff try to show students their value every day. They believe this attitude has created a culture where students succeed.

### Woodburn School District

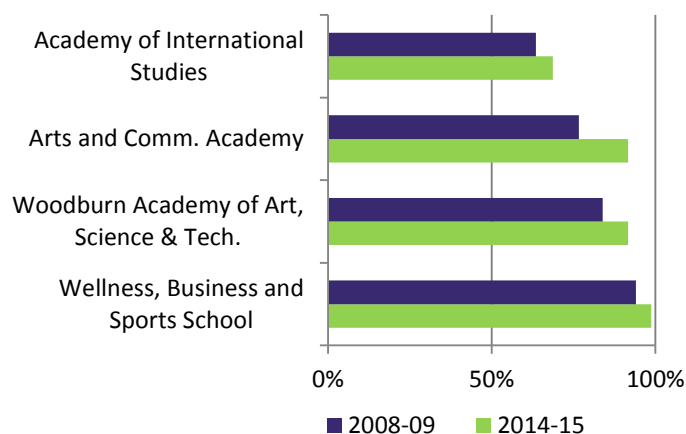
The Woodburn School District's graduation rate for all students grew from 59% in 2008-09 to 84.5% in 2014-15. In particular, the district has seen strong growth in graduation rates since 2012-13 for its regular high schools.

Woodburn's regular high school started reorganizing in the early 2000s via Oregon's Small Schools Initiative. Operationally, this transformation meant the school went from one large high school to four small, autonomous high schools functioning from one campus. This transformation helped Woodburn provide a more personalized learning experience for each of its students. For example, instead of having a large math department, each school has a staff of two or three math teachers. These teachers may have students multiple times during their high school careers. The principals for each school know all their students by name. This helps staff and students develop stronger relationships, which leads to better academic outcomes. Woodburn School Superintendent Chuck Ransom calls it "high school on a human scale."

While the small schools model is working for Woodburn, Ransom notes that the school district's success is the result of making high school a more individualized experience for each student. Ransom also credits the recent rise in graduation rates to the school district's

efforts to value diversity. In the early 2000s, Woodburn changed its curriculum to include a district-wide dual language program. Those students who started the program in elementary school started graduating in the past few years. Ransom believes this shift helped to improve academic achievement at Woodburn and also created a sense of respect and connection with the larger community, which has a high percentage of Hispanics, Russians, and Ukrainians.

### Woodburn High Schools Graduation Rates



Ransom says that raising graduation rates requires a long-term investment and complex set of strategies based on best practices and solid research. It also requires continuity of school board members and the belief by staff and community that all children can learn. If we're asking students to make changes, then the adults need to make changes as well, Ransom says.

### Looking forward

The seven schools and one district highlighted in this brief represent a handful of the schools that are making improvements in their graduation rates across the state. These schools are finding ways to make the high school experience more individualized, personal, and engaging. Making sure students feel connected and valued establishes a foundation for their future success. Providing engaging and relevant curriculum helps students connect their high school classes to their future dreams. These schools set high academic expectations and then look for ways to change the system to help students succeed. There is much that we can learn from these and other examples of success across our state as we all work together to reach our state's graduation goals.



## STEM-RELATED GRANT ACTIVITY

\*All submitted NSF grants

\*2008-present for all other related grants

Due Date	Agency	Program Title	Proposal Purpose	Funding Requested	Funding Received	Status
1/29/13	Intel Foundation	Ultimate Engineering Experience	To host a six-week, intensive summer program for PCC and local Engineering and Computer Science students. Utilizing team projects, professional skill development and networking, this hands-on experience gives students a feel for what being an Intel engineer is like.	\$33,961	\$33,961	Funded
11/4/11	NSF	Community College Undergrad Research (CCURI)	As a partner on Finger Lakes Community College's CCURI grant, PCC will develop research activities around an environmentally relevant topic to be integrated into our Biology and Environmental Studies and Resources (ESR) programs.	\$7,000	\$4,930	Funded
8/11/11	NSF	(S-STEM) Technology, Access and Diversity	To boost the number of educated and skilled technology workers in the Portland metro area, with a focus on populations underrepresented in these fields. Sixty-four scholarships will be offered, in addition to student outreach and support, career exploration, college transfer and job placement services.	\$599,384	\$599,384	Funded
10/21/10	NSF	Regional ATE Project (Revised from ATE Center submitted 2010)	To continue a Regional Project for professional development of college and high school instructors to meet the demand for workers knowledgeable and trained in sustainability practices in the built environment.	\$1,115,315	\$1,115,315	Funded
10/21/10	NSF	Saddleback Community College ATE Center	As a partner to Saddleback, Pat Kraft will teach a summer-term one-week Advanced Manufacturing Conference for local high school instructors.	\$105,000	\$49,472	Funded
7/23/10	US DOED	FIPSE Earmark - Renewable Energy Training	To purchase equipment to enhance the EET and Renewable Energy labs, to meet industry standards and improve students' employability.	\$350,000	\$350,000	Funded
7/7/10	US Small Business Administration	Fueling Portland's Green Economic Recovery: Hybrid Vehicle Technology Training	To contribute to the green economic recovery in Portland, Oregon by offering continuing education courses in hybrid vehicle technology to incumbent automotive workers.	\$200,000	\$200,000	Funded
12/31/09	NASA	Earth Science Course Development	To develop and deliver GCC2: Adaptation and Mitigation, the second in a series of community education courses to educate the public about global climate change. The grant will also fund a summer school scholarship for 100 high schools to participate in the first course of the series.	\$5,000	\$5,000	Funded
10/20/09	US DOL	State Energy Sector Partnership	Worksystems Inc. will coordinate the Region 2 portion of the State's grant project, including Multnomah and Washington counties. As a partner, PCC will provide training for unemployed and underemployed people in so that they qualify for emerging green jobs.	TBD	\$0	Funded
10/15/09	NSF	Exploring Biotechnology: A Pathway to Prosperity in Rural and Urban Oregon	As partner to Linn-Benton Community College, PCC will assist in forging a comprehensive and attainable vision for bioscience education and workforce development in the Willamette Valley.	\$10,808	\$8,986	Funded
9/4/09	US DOL	Energy Training Partnership (WSI lead)	The Oregon Manufacturing Extension Partnership (OMEP) will preserve and create jobs in the renewable energy industries. As partners, PCC WorkSource Centers will provide skills assessment, career counseling, student support and job placement services for participants in the program.	TBD	\$0	Funded
6/12/09	Oregon DOED	PAVTEC Middle School Girls Conference 2010	To put on the 15th annual Math, Science and Technology Conference for Middle School Girls, which provides motivation and occupational information in STEM areas through hands-on experience for local 7th and 8th grade girls.	\$8,000	\$8,000	Funded
6/2/09	NSF	Geoscience Programs at Community Colleges: Models for Success & Innovation	To provide financial support for community college faculty and students to attend the earth science education session at the 2009 Geological Society of America (GSA) national conference, presented by PCC faculty Frank Granshaw.	\$29,097	\$29,097	Funded
2/9/09	Worksystems, Inc.	Sustainability Training Models	A public-private partnership with Mt Hood Community College and Johnson Controls that will respond to the burgeoning demand for training in sustainability and green jobs.	\$92,500	\$92,500	Funded
10/11/07	NSF	ATE Sustainability Training for Technical Educators (STTE)	To infuse sustainability content, practices, tools and techniques into PCC programs that impact the built environment by providing a variety of professional development and training activities to faculty in the Building Construction Technology, Architectural Drafting & Design/Interior Design, Facilities Maintenance Technology, Landscaping and Engineering.	\$792,816	\$698,095	Funded
7/16/07	NSF	Earthscope - Collaborative Research: Teachers on the Leading Edge: Linking K-12 Earth Science Teachers to Earthscope	The grant will support a professional development program designed to introduce K-12 teachers and their students in geology and geophysics of the Pacific Northwest. Partnership with University of Portland, Pacific Lutheran and Central Washington Universities.	\$13,610	\$13,610	Funded

## STEM-RELATED GRANT ACTIVITY

\*All submitted NSF grants

\*2008-present for all other related grants

2/16/07	NSF	S-STEM Engineering 2007	To provide scholarships to students seeking a two-year degree in Electrical Engineering, Machine Manufacturing, Civil/Mechanical Engineering and Microelectronics Technology. The program will target underrepresented student groups and those with the most financial need.	\$596,214	\$596,214	Funded
10/12/06	NSF	ATE Rapid Prototyping (Saddleback C.C.)	In partnership with Saddleback Community College, PCC will enhance curriculum and serve as a satellite site to Saddleback's Regional Center for Rapid Prototyping. In addition to receiving equipment, PCC's Machine Technology department would act as the dissemination site for Oregon for the training materials for this field.	\$115,000	\$40,000	Funded
10/18/05	NSF	ATE Center for Sustainable Practices	For a planning grant to support the development of the Center for Sustainable Practices at Rock Creek (Rock Creek Campus)	\$69,998	\$69,998	Funded
10/16/02	NSF	ATE 2002 Framing Student Success: Increasing Math and Science Achievement through Construction Technology	To improve science and math education for high school students through construction technology experiences, and professional development to high school teachers, and to improve the quality of the BCT program. (Rock Creek Building Construction Technology Department with OSU)	\$697,750	\$697,750	Funded
7/3/13	US DOL	Trade Assistance Act Community College & Career Training (TAACCCT) - Round 3	STEM Up Oregon is a consortia proposal encompassing all 17 Oregon community colleges. Building off the success of the CASE grant, the Consortia is proposing a project that is primarily focused on developing and delivering Career Pathways in STEM industries to unemployed and underemployed workers including those workers whose jobs have been impacted by Trade (i.e. TAA eligible). The Consortia will focus on projects that either: 1) Expand and/or enhance STEM training programs, or 2) increase STEM skills in other programs identified through WIA Sector Strategies	\$1,995,072		Not Funded
7/17/12	NSF	REESE (Research and Evaluation on Education in Science and Engineering) The Parietal Sensorimotor Complex and the Mathematical Imagination	This five year Portland State University partnership research grant investigates how students learn math. Twelve PCC students at various mathematical levels will be interviewed each year with the intention of understanding the multiple representation imagery and activity of each student.	\$282,230		Not Funded
5/29/12	NSF	TUES (Math for CTE Careers (MC2))	Enables PCC to develop an alternative Developmental Math pathway for Career and Technical Education (CTE) students that would be more in line with their career needs than the traditional math pathway. It involves the creation of two new courses, a mentoring program for faculty teaching the courses, and an interdisciplinary Math/CTE Community of Practice.	\$199,887		Not Funded
5/24/12	US DOL	Los Angeles TAACCCT I-5 Electrification Project	PCC will add a certificate program in hybrid/electric vehicle repair and maintenance to the automotive services technician program. LATTC will lead the consortium members with a total budget of \$10-\$15 million.	\$1,912,078		Not Funded
12/5/11	NSF	Science, Engineering, and Education for Sustainability (SEES) Fellowship	A post-doctoral fellowship that funds scientific research that crosses traditional disciplinary boundaries and addresses sustainability issues. Frank Granshaw will design, implement and evaluate urban fieldwork activities, involving students in research activities.	\$384,795		Not Funded
9/11/11	NSF	STEP - Science, Technology, Engineering and Mathematics Talent Expansion Program (STEP) - PROGRESS (Portland Reaching Out, Guiding, and Reenergizing Engineering and Science Study)	Partnership with PSU. PROGRESS (Portland Reaching Out, Guiding, and Reenergizing Engineering and Science Study) will create a clear path in STEM (science, technology, engineering, and mathematics) fields from Portland Community Colleges (PCC) to and through a Portland State University (PSU) degree, thereby increasing the number and diversity of students in STEM pathways. Recruitment will focus on attracting underrepresented minorities, first-generation college students, and women entering physical sciences and engineering.	\$1,059,366		Not Funded
5/2/11	US EPA	Environmental Education Regional Grants	To provide professional development, through workshops and in-service events, for faculty to incorporate climate change issues into existing courses.	\$44,589		Not Funded
4/21/11	US DOL	Trade Adjustment Assistance Community College and Career Training (TAACCCT) Act - OTC Consortium	As part of the Oregon TAACCCT Consortium of nine community colleges, PCC will bring the successful pilot program of Accelerate Mathematics Progress to scale. The program is designed to move students through lower-level math courses more quickly, to accelerate attainment of certificates and degrees.	\$1,185,814		Not Funded
10/21/10	NSF	Regional ATE Center for High Performance Design, Build and Operations	To create a Regional Center for professional development of college and high school instructors to meet the demand for workers knowledgeable and trained in sustainability practices in the built environment.	\$2,038,242		Not Funded



## STEM-RELATED GRANT ACTIVITY

\*All submitted NSF grants

\*2008-present for all other related grants

6/15/09	Bonneville Environmental Foundation	Solar 4R Schools	To receive the donation of a solar photovoltaic (PV) system for Rock Creek, which will be used in the Solar Manufacturing Technology program as a "hands-on" learning tool, and the PCC community for sustainability education and awareness.	\$20,000	Not Funded
5/29/09	US DOED	ODOT Oregon EV and EV Charging Network (Clean Cities)	As part of a collaborative effort with the Oregon Department of Transportation, this grant will purchase electric vehicle charging stations, as well as plug-in hybrid electric vehicles to reduce petroleum use and instruct automotive students on the emerging technology.	\$167,183	Not Funded
5/9/07	NSF	CCLI - Increasing Higher Level Mathematics for Electronic Engineering Students at Community Colleges	Will bridge the gap between theory and practice in community college electronic engineering technology programs by developing an Automation and Robotics option in the EET program, while modifying and developing EET courses and purchasing and integrating robotic and automation equipment.	\$147,529	Not Funded
7/16/06	NSF	EarthScope Science (with University of Portland)	EarthScope is a multidisciplinary geophysical investigation of the North American continent with instruments being installed across the Pacific Northwest. This cooperative grant with the University of Portland will create a Teachers on the Learning Edge (TOTLE) program, a teacher professional development program featuring field study of active continental margin geology in the Pacific Northwest. This funds from this grant will : 1) immerse 100 PNW teachers in field studies; further develop TOTLE's links to EarthScope's instruments; develop instructional materials; and provide a template for geoscience educators.	\$49,750	Not Funded
10/18/05	NSF	ATE 2005 Rapid Prototyping (Saddleback College)	To develop rapid prototyping manufacturing educational formats and delivery systems. Funds will provide rapid prototyping equipment and instructor salaries. (Sylvania Machine Technology Department with Saddleback Community College as lead)	\$100,000 subgrant from Saddleback CC over 4 years, plus \$15,000 for equipment.	Not Funded
5/19/05	NSF	CCLI Geoscience for Nonscientists	To improve GS 106 and GS 109 students' understanding of basic geoscience concepts and to assemble a collection of activities, media and equipment to facilitate hands-on learning, and to train faculty on how to incorporate these tools into their courses.(Sylvania and Rock Creek General Science Departments)	\$195,109 over 2 years	Not Funded
2/10/05	NSF	Science, Technology, Engineering and Mathematics Talent Expansion Program (STEP)	PCC's subgrant of a PSU grant to provide a pre-college educational program dedicated to supporting historically underrepresented students to pursue careers in mathematics, engineering and science. PCC will test a pilot program to identify low-income and first-generation students and provide them a program of activities to nurture college engagement.	\$75,000 to PCC	Not Funded
10/7/04	NSF	ATE "Putting Math to Work - Building a Contextual Foundation in Developmental Mathematics"	To develop educational materials and distance education modalities to improve mathematics instruction. (Distance Education and PCC Math Department with OPB as lead)	\$81,703 to PCC over 3 years as subgrant from OPB	Not Funded
12/10/03	NSF	Math and Science Partnership	To create new models for teacher preparation and professional development that align with Oregon's high school reform. Five public and private universities, PCC, seven school districts, Oregon's four main state education agencies, and 11 diverse industries/businesses will create six new math/science education teacher prep models and six new math/science/preengineering professional models. (Business Education Compact is lead with Cascade Dept. of Education and PAVTEC as partners)	\$527,649 over 5 years	Not Funded
12/4/02	NSF	CCLI 2002 Improving Mathematics Skills of Community College Students Taking Introductory Science Courses	To develop and implement on-line mathematics assessments and tutorials for students taking introductory science classes. (College-wide Math and Science Departments)	\$195,250 over 3 years	Not Funded
11/6/13	NSF	Advanced Technological Education (ATE) - Planning Grant for Advanced Manufacturing Education Training (AMET) Center	To plan a National Center for Advanced Manufacturing Educator Training (AMET Center), which will have a disciplinary focus on Advanced Manufacturing Technologies and will support the development of a job-ready workforce for the US Manufacturing sector.	\$70,000	Submitted/ Decision Pending
11/1/13	NIH	Bridges to Baccalaureate	To increase the number of specific underrepresented students (ethnic minorities, students with economic and other disadvantages, and students with disabilities) transferring from PCC to PSU in pursuit of academic and scientific careers in the biomedical and behavioral sciences.	\$375,624	Submitted/ Decision Pending

**STEM-RELATED GRANT ACTIVITY**

\*All submitted NSF grants

\*2008-present for all other related grants

10/8/13	NSF	ATE Center - UC Irvine Rapidtech	As a partner to UC Irvine, PCC will provide invaluable training to high school and college educators in subject areas related to rapid prototyping and additive manufacturing.	\$60,365		Submitted/ Decision Pending
10/8/13	NSF	Pacific Northwest Louis Stokes Alliance for Minority Participation (LSAMP)	To increase PCC students' exposure to research opportunities and STEM-related conferences and to provide leadership experiences, therefore increasing persistence in their studies and transfer to PSU to obtain a bachelor's degree.	\$50,000		Submitted/ Decision Pending

79th OREGON LEGISLATIVE ASSEMBLY--2017 Regular Session

# House Bill 2258

Introduced and printed pursuant to House Rule 12.00. Presession filed (at the request of Governor Kate Brown for Department of Education)

## SUMMARY

The following summary is not prepared by the sponsors of the measure and is not a part of the body thereof subject to consideration by the Legislative Assembly. It is an editor's brief statement of the essential features of the measure **as introduced**.

Expands types of entities that may receive funding for certain activities related to science, technology, engineering and mathematics education and to career and technical education.

Declares emergency, effective on passage.

## A BILL FOR AN ACT

Relating to entities that can receive grant distributions from the Department of Education; amending ORS 327.372; and declaring an emergency.

**Be It Enacted by the People of the State of Oregon:**

**SECTION 1.** ORS 327.372 is amended to read:

327.372. (1) Activities related to science, technology, engineering and mathematics education and activities related to career and technical education that can lead to high wage and high demand jobs shall be funded as provided by this section.

(2) The Department of Education shall distribute moneys appropriated to the department, or otherwise made available to the department, for the purpose of funding activities related to science, technology, engineering and mathematics education and activities related to career and technical education. Distributions shall be made as follows:

(a) Thirty-five percent for activities related to science, technology, engineering and mathematics education that are described in subsection (3) of this section.

(b) Sixty-five percent for activities related to career and technical education that can lead to high wage and high demand jobs and that are described in subsection (4) of this section.

(3) Moneys distributed as provided by subsection (2)(a) of this section to fund activities related to science, technology, engineering and mathematics education shall be used to:

(a) Expand and sustain regional networks that support science, technology, engineering and mathematics.

(b) Award grants that expand the implementation of effective programs related to science, technology, engineering and mathematics, that propose innovative approaches or programs related to science, technology, engineering and mathematics or that provide professional development related to teaching science, technology, engineering and mathematics.

(c) Provide funding to recruit, retain and support underserved students, as defined by the State Board of Education by rule, for programs that are offered at community colleges and public universities and that can lead to high wage and high demand jobs related to science, technology, engineering and mathematics.

(d) Develop a systematic survey of facility use to determine how savings for science, technology, engineering and mathematics education can be achieved.

**NOTE:** Matter in **boldfaced** type in an amended section is new; matter [*italic and bracketed*] is existing law to be omitted. New sections are in **boldfaced** type.

(4) Moneys distributed as provided by subsection (2)(b) of this section to fund activities related to career and technical education that can lead to high wage and high demand jobs shall be used for:

(a) Programs that expose students to career and technical education programs that can lead to high wage and high demand jobs.

(b) Career and Technical Education Revitalization grants awarded under ORS 344.075.

(c) Student leadership organizations related to career and technical education programs that can lead to high wage and high demand jobs.

(d) Distribution to school districts to support career and technical education programs in the school district that are approved by the Department of Education as being high quality and that can lead to high wage and high demand jobs. Moneys must be distributed to each school and public charter school in the school district based on the number of students enrolled at the school with the following characteristics:

(A) Students who are enrolled in and earned three or more credits for courses that are part of a career and technical education program that can lead to high wage and high demand jobs and that are approved by the Department of Education.

(B) Students who acquire an industry credential that can lead to a high wage and high demand job and that is approved by the Department of Education.

(C) Students described in subparagraph (A) or (B) of this paragraph who are historically underserved, as defined by the State Board of Education by rule.

(e) Administration of grants for the purpose of expanding teacher training programs and opportunities related to career and technical education that can lead to high wage and high demand jobs.

(f) Administration of a pilot program to increase students' exposure and access to career and technical education that can lead to high wage and high demand jobs.

(5) Except as otherwise provided, moneys distributed under subsections (3) and (4) of this section shall be distributed to school districts, education service districts, public schools, public charter schools, community colleges, [or] public universities **or statewide nonprofit organizations promoting student leadership in career and technical education** or any **combination** thereof **or** in partnership with youth job development organizations, as defined in ORS 344.415, **other** nonprofit organizations or other entities identified by the State Board of Education by rule.

(6) From the moneys available under subsection (2) of this section, the Department of Education, the STEM Investment Council and the committee established under ORS 344.075 combined may retain no more than a total of five percent of all moneys distributed for a fiscal year for administrative expenses incurred under this section.

(7) The Department of Education, in collaboration with the STEM Investment Council and the committee established under ORS 344.075, shall submit a biennial report to the Legislative Assembly related to distributions made under this section. The report must include metrics that identify how distributions made under this section are contributing to the development of a skilled workforce that is able to secure high wage and high demand jobs.

**SECTION 2.** ORS 327.372, as amended by section 2, chapter 763, Oregon Laws 2015, is amended to read:

327.372. (1) Activities related to science, technology, engineering and mathematics education and activities related to career and technical education that can lead to high wage and high demand jobs shall be funded as provided by this section.

(2) The Department of Education shall distribute moneys in the Connecting Education to Ca-

1 reers Account established by ORS 327.376 as follows:

2 (a) Forty percent for activities related to science, technology, engineering and mathematics ed-  
3 ucation that are described in subsection (3) of this section. Moneys shall be distributed by the de-  
4 partment under this paragraph based on recommendations of the STEM Investment Council.

5 (b) Sixty percent for activities related to career and technical education that can lead to high  
6 wage and high demand jobs and that are described in subsection (4) of this section. Moneys shall  
7 be distributed by the department under this paragraph based on recommendations of the committee  
8 established under ORS 344.075.

9 (3) Moneys distributed as provided by subsection (2)(a) of this section to fund activities related  
10 to science, technology, engineering and mathematics education shall be used to:

11 (a) Expand and sustain regional networks that support science, technology, engineering and  
12 mathematics.

13 (b) Award grants that expand the implementation of effective programs related to science,  
14 technology, engineering and mathematics, that propose innovative approaches or programs related  
15 to science, technology, engineering and mathematics or that provide professional development re-  
16 lated to teaching science, technology, engineering and mathematics.

17 (c) Provide funding to recruit, retain and support underserved students, as defined by the State  
18 Board of Education by rule, for programs that are offered at community colleges and public uni-  
19 versities and that can lead to high wage and high demand jobs related to science, technology, en-  
20 gineering and mathematics.

21 (d) Develop a systematic survey of facility use to determine how savings for science, technology,  
22 engineering and mathematics education can be achieved.

23 (e) Fund any other activities related to science, engineering and mathematics education that are  
24 identified by the STEM Investment Council.

25 (4) Moneys distributed as provided by subsection (2)(b) of this section to fund activities related  
26 to career and technical education that can lead to high wage and high demand jobs shall be used  
27 for:

28 (a) Programs that expose students to career and technical education programs that can lead to  
29 high wage and high demand jobs.

30 (b) Career and Technical Education Revitalization grants awarded under ORS 344.075.

31 (c) Student leadership organizations related to career and technical education programs that can  
32 lead to high wage and high demand jobs.

33 (d) Distribution to school districts to support career and technical education programs in the  
34 school district that are approved by the Department of Education as being high quality and that can  
35 lead to high wage and high demand jobs. Moneys must be distributed to each school and public  
36 charter school in the school district based on the number of students enrolled at the school with the  
37 following characteristics:

38 (A) Students who are enrolled in and earned three or more credits for courses that are part of  
39 a career and technical education program that can lead to high wage and high demand jobs and that  
40 are approved by the Department of Education.

41 (B) Students who acquire an industry credential that can lead to a high wage and high demand  
42 job and that is approved by the Department of Education.

43 (C) Students described in subparagraph (A) or (B) of this paragraph who are historically under-  
44 served, as defined by the State Board of Education by rule.

45 (e) Administration of grants for the purpose of expanding teacher training programs and oppor-

1 tunities related to career and technical education that can lead to high wage and high demand jobs.

2 (f) Administration of a pilot program to increase students' exposure and access to career and  
3 technical education that can lead to high wage and high demand jobs.

4 (g) Funding any other activities related to career and technical education that can lead to high  
5 wage and high demand jobs and that are identified by the committee established under ORS 344.075.

6 (5) Except as otherwise provided, moneys distributed under subsections (3) and (4) of this section  
7 shall be distributed to school districts, education service districts, public schools, public charter  
8 schools, community colleges, [or] public universities **or statewide nonprofit organizations pro-**  
9 **moting student leadership in career and technical education** or any **combination** thereof **or** in  
10 partnership with youth job development organizations, as defined in ORS 344.415, **other** nonprofit  
11 organizations or other entities identified by the State Board of Education by rule.

12 (6) From the moneys available under subsection (2) of this section, the Department of Education,  
13 the STEM Investment Council and the committee established under ORS 344.075 combined may re-  
14 tain no more than a total of five percent of all moneys distributed for a fiscal year for administrative  
15 expenses incurred under this section.

16 (7) The Department of Education, in collaboration with the STEM Investment Council and the  
17 committee established under ORS 344.075, shall submit a biennial report to the Legislative Assembly  
18 related to distributions made under this section. The report must include metrics that identify how  
19 distributions made under this section are contributing to the development of a skilled workforce that  
20 is able to secure high wage and high demand jobs.

21 **SECTION 3. This 2017 Act being necessary for the immediate preservation of the public**  
22 **peace, health and safety, an emergency is declared to exist, and this 2017 Act takes effect**  
23 **on its passage.**  
24

---



## APPLICATION COVER PAGE

Project Name: Hillsboro Manufacturing Training and Learning Center
Amount Requested: \$394,312

Project Director: Brooke Nova			
District, School or ESD: Hillsboro School District			
Address: 3083 NE 49th Place			
City: Hillsboro		State: OR	
		Zip: 97124	
Phone: (503) 844-1485		Email: novab@hsd.k12.or.us	

Grant Fiscal Agent Contact: Adam Stewart		
District, Charter School or ESD: Hillsboro School District		
Address: 3083 NE 49th Place		
City: Hillsboro	State: OR	Zip: 97124
Phone: (503) 844-1500	Email: stewarta@hsd.k12.or.us	

Superintendent: Mike Scott		
District or ESD: Hillsboro School District		
Address: 3083 NE 49th Place		
City: Hillsboro	State: OR	Zip: 97214
Phone: (503) 844-1500	Email: scottm@hsd.k12.or.us	

	Participating High School or Middle School Name	Lead Contact Name	Grade Levels	Student Enrollment
1.	Century High School	Tim Morley	9-12	1,647
2.	Banks High School	Jeff Leo	9-12	369
3.	Brown Middle School	Koreen Barreras-Brown	7-8	729
4.	Glencoe High School	Claudia Ruf	9-12	1,595
5.	Hillsboro High School	Arturo Lomeli	9-12	1,334
6.	Liberty High School	Greg Timmons	9-12	1,424
7.	Miller Education Center	Gregg O'Mara	9-12	Dual enrolled with comprehensive HSD schools
8.	Hillsboro School District	Mike Scott	P-12	Total: 20,955

## Application Narrative

### A. Project Abstract

Hillsboro School District (HSD) aims to create a premier training and learning center housed at Century High School in the fields of manufacturing and design for students and educators across the district and region. HSD is uniquely positioned to create a first rate hub by building upon the existing infrastructure, program, equipment, and committed partnerships. As the 4th largest district in Oregon with 51% students of color, the region is projected to grow 30,000 high wage, high demand manufacturing positions over the next 10 years.<sup>1</sup> The Manufacturing Center will expand the reach of existing CTE programming from **209 students to 630 middle and high school students** by creating access to horizontal and vertical pathways for **7,098** middle and high school students in Hillsboro and Banks School Districts, and via Worksystems, Inc.'s Sector Pathway Training Program. The Center will: 1) create rigorous, career-aligned dual credit program of study opportunities supported via expanded partnerships; and 2) build a pipeline of students from Century's feeder middle and elementary schools who gain hands-on lab experience.

### B. CTE Revitalization Grant Vision

The manufacturing program at Century High School (Century) is led by Tim Morley, who is the recipient of the 2012 Outstanding Career and Technical Education Promising Practice and the 2014 Career and Tech Education Teacher of the Year awards. HSD currently offers 19 Career and Technical Education (CTE) programs of study. Despite being located in the Silicon Forest, the district's industrial and engineering programs **lack sufficient industry-standard equipment, staffing supports, and funding to expand partnerships** in order to create a

---

<sup>1</sup> Worksystems, Inc.: <http://www.worksystems.org/research/advanced-manufacturing-sector-report-2014>

rigorous manufacturing CTE program of study for students. The proposed premier manufacturing hub (“The Center”) will support students across Hillsboro’s high schools and the feeder middle and elementary schools for Century. Additionally, in partnership with Banks School District (Banks) and Worksystems, Inc. (WSI), this program will provide access to underserved students in Hillsboro, Banks, Tigard-Tualatin, and Beaverton alternative education programs who would not otherwise have access to a rigorous manufacturing program.

This grant will allow the district to revitalize CTE in Hillsboro by expanding its current manufacturing offerings both horizontally and vertically to create a robust real-world applicable course of study. As a result, the first-rate training and learning center will: 1) create rigorous, career-aligned dual credit program of study opportunities for **430 high school students** from Hillsboro, Banks, and students in WSI’s Sector Pathway Training Program; and 2) build a pipeline of **200 middle school students and 180 elementary school students** from Century’s feeder schools who gain hands-on Manufacturing experiences. **In total, the CTE Manufacturing program will grow from serving 209 students to 630 middle and high school students.**

By funding the following, HSD will be able to revitalize the manufacturing CTE program for the region:

- Industry-Standard Manufacturing and Design Equipment: Century has been fortunate in working with local partners to acquire 11 pieces of manufacturing equipment. In order to simulate a real world manufacturing experience for students, the facility requires an investment in machines and technology including computers, Vinyl cutters, CNC machines, and additional items detailed in the proposed budget.

- Center Staffing: In order to leverage the industry-standard facility to expand access to students and teachers, the center will require a part-time Manufacturing Center Assistant, as well as compensation for teacher time spent after school and during weekend offerings. WSI has committed to provide a teacher to lead the Pathways to Training cohort of students. Hillsboro plans to sustain the Manufacturing Center Assistant position beyond the grant cycle.
- Expanded Partnerships and Internship Opportunities: As HSD builds a stronger connection between postsecondary and career pathways it is a priority to provide students with *paid* internship opportunities. In partnership with WSI, Hillsboro will fund 15 paid 180-hour student summer internships through the Summer Works program. Additionally, 40 students during the 2016-17 school year will participate in 15-hour unpaid internships.

The requested funding will enable Hillsboro to develop an **innovative** Center at Century that simulates the professional manufacturing experience by significantly increasing student hands-on time with industry standard equipment and rates of production. Students will learn real-world, critical thinking skills by using trial and error to move a rigorous, simulated project from concept to prototype. The Center will **integrate** academic, community resources, and high wage and high demand pathways for students. The program will **expand and grow the students served in the Manufacturing CTE Program** by vertically aligning programming across Century's feeder elementary and middle schools, and horizontally across Hillsboro and Banks high schools, and in collaboration with WSI's Sector Pathway Training Program to reach students in alternative education programs, offer 10 Portland Community College Credits in Machining 290, 291, 292 and anticipated in Engineering 100. HSD is committed to providing

transportation and aligning schedules so that all high school students across the district have access to the Center.

Collaboration with industry, postsecondary, and community partners will enable HSD to create new career-related and job-embedded learning opportunities for students and educators in the field of manufacturing. The program will expand the numbers of students served during the school day and out of school by offering six weekend courses during the grant cycle consisting of two 5-hour sessions, through which high school students will have the opportunity to earn 1 Portland Community College credit in 3D printing. By creating new dual credit opportunities to students who may not traditionally earn credit within the manufacturing pathway, HSD aims to increase the diploma to career pathway in a high wage and high demand industry.

The vision of the program is to **reinvent the ways in which students currently experience CTE programming, earning up to 10 dual credits at PCC**, so that students engage in a rigorous program of study that exposes and prepares them for the rich opportunities of manufacturing careers. Students will develop their entrepreneurial skills through the manufacturing process, and work in teams on a production assembly line pace and with the collaboration required of a manufacturing business. HSD's partners are committed to linking the course of study with industry exposure and higher education credit articulation. The Center is designed to increase **experiential learning opportunities** through which students will simulate on-the-job training experiences via 17-20 paid internships, as well as additional job shadow and unpaid internship opportunities created with industry partners. Additionally, increasing the equipment from 11 to 47 industry-standard machines will enable students to engage in more rigorous manufacturing projects. The expanded pathway will enable more students to access dual credit opportunities that lead to **high wage and high demand manufacturing careers**, which

Worksystems Inc. projects will grow by more than 30,000 positions in Washington County over the next decade, creating advanced manufacturing positions that pay a median of \$23.04/hour.<sup>2</sup>

As discussed at greater length in Section I: Equity, a core goal of the initiative is to expand access and rigor of the manufacturing program to **historically underserved students**, with a focus on increasing the participation of Latino/Hispanic and female students, as well as students in alternative education programs.

Additionally, the partnership with WSI will enable the center to be utilized by cohorts of youth in alternative education settings who would otherwise not have access to the courses of study and rigorous, job-applicable experience. If funded, the Center will become a hub for the region to develop the next generation of diverse students prepared for high wage, high demand manufacturing positions.

### **C. Partnerships**

Hillsboro School District has garnered significant commitment for the proposed Center from K-12 school, postsecondary, industry, and community partners for this proposal. Partners have played a strong role in the development of the vision of creating the premier manufacturing hub. The project was developed with partners through a series of working meetings, and partners will continue to meet quarterly to advise on the direction of the program. As a collective, the partners outlined below and in the included letters of commitment represent a set of more than 15 organizations, businesses, and industry focused on producing, supporting, and delivering high wage and high demand manufacturing careers in our region.

---

<sup>2</sup> <http://www.worksystems.org/research/advanced-manufacturing-sector-report-2014>



HSD has garnered significant commitments from partner organizations that are integral to the project. Key partnership commitments outlined below. The enclosed Partner List and Letters of Commitment (Appendix D) provide further details.

- Postsecondary support via Portland Community College (PCC): Hillsboro will continue to build on longstanding relationships with Portland Community College to extend 10 dual credit offerings to students in Machining 290, 291, and 292, and anticipated in Engineering 100.
- Industry Partners: Industry partners include Worksystems, Inc., Duyck Machine, Inc., Hillsboro Chamber of Commerce, C.F. Plastics, Inc., BDE Manufacturing Technologies, and American Precision Industries, Inc. Industry partners have committed to strengthening the school to work connection through new opportunities including: 17-20 paid internships, mentoring opportunities, bi-monthly job shadows, guest speakers and other career-related learning experiences, a Career Manufacturing Day bus tour, in-kind access to equipment and materials, and continued engagement as advisory members.
- School Partners: Banks School District and Hillsboro Schools have committed to creating the aligned horizontal and vertical pathways that will provide 7,098 students with access to the Center. Specifically, Banks has committed to provide transportation for up to 80 students during the school year; providing extended contract pay for a certified staff member to attend the workshop with students; 3 substitute days for the Banks manufacturing teacher to collaborate with Hillsboro's manufacturing teacher; and to serve as advisory members to support the growth of the program. Century HS feeder schools, Brown Middle School and Reedville Elementary School are committed to

increasing access for historically underserved groups to gain hands-on manufacturing experiences.

- Education Training Partners: The Oregon Computer Science Teachers Association (OCSTA), PACTEC at Portland Community College, and the Center for Science at Portland State University have agreed to devote resources to ensure that educators across the region gain increased training to support the pipeline of students exposed to Manufacturing pathways and have committed to support teacher training workshops and providing educators with professional development (PDU) or continuing education (CEU) credits. Portland Metro STEM Partnership will also provide technical assistance related to project evaluation and assessment project goals.

In sum, Hillsboro has worked in close collaboration to develop partnerships with the key partners outlined above and other, more informal partners. The success of the manufacturing Center relies on the on-going commitment and support of HSD's partners during and beyond the grant cycle. Since such a strong foundation has been laid, and an infrastructure is being created to sustain it, this work will continue long into the future.

#### **G. CTE Program of Study Design**

Hillsboro School District and Century High School have worked closely with Portland Community College over the last 10 years to develop a CTE program of study and dual credit offerings. Century CTE teacher, Tim Morley, has training in the use and application of advanced digital technologies and has implemented dual credits through PCC for many of these technologies. Mr. Morley's program of study currently consists of **3 high school credits for completion and up to 10 articulated credits through PCC**. The approved courses articulated

with PCC are: Machining 290, 291, and 292. Additionally, Engineering 100 paperwork is in process for approval.

The program is an ODE-approved program of study and is aligned with relevant State academic content standards, industry-recognized technical standards, and employability skill sets determined in collaboration with an advisory board made up of industry representatives through PCC. The proposed program will enable Mr. Morley to develop more rigorous, relevant, and complex manufacturing and design projects for students to tackle, and triple the number of students who can participate and earn up to 10 dual credits. Additionally, through the amplified hands-on access to equipment, students will be increase their skill as measured by the state approved Technical Skills Assessment (TSA). Through the program, high school students will gain articulation of college credits, and more project-based and job-embedded industry experiences. The 10 dual credits available via PCC can be applied to the manufacturing pathway at Portland Community College and comparable programs at state universities.

Through the program of study, students will gain skills in using Rhino 3D software, and apply drafting and design skills to product prototypes on various manufacturing equipment. Articulated credits available aligned to Industry Validated Technical Skills.

The program is designed to be culturally responsive to meet the needs of historically underserved student populations. Intentional outreach through strategies outlined in Section I: Equity and Section L: Communication will ensure the program serves a higher number of historically underserved students. Through the grant cycle, HSD has also allocated funds to host teacher training and curriculum development opportunities, which will include a focus on culturally responsive pedagogy in manufacturing and CTE programming.

## **H. High Wage and High Demand Occupations**

While Hillsboro School District is located within the Silicon Forest filled with high wage and high demand career opportunities, our students have not had access to rigorous advanced manufacturing academic and career pathways. By developing Century's program to become a premier manufacturing hub for the district and region, Hillsboro aims to revitalize and build a pipeline with the burgeoning local manufacturing industry. Worksystems, Inc. "2014 Advanced Manufacturing Sector Report" sheds light on the extent to which advanced manufacturing is a high wage and high demand path to pursue. WSI projects a 19.2% increase in manufacturing job growth between 2012 and 2022. Furthermore, our Washington County region is expected to have 37,665 advanced manufacturing positions and this "future growth will account for 4 out of every 10 new jobs."<sup>3</sup> Clearly there is demand for advanced manufacturing positions. There is also demonstrated evidence of high wage opportunities through this career path. The WSI report has found that the median wage for advanced manufacturing is \$23.04 (2012), which is "nearly 1.5 times that of all industries (\$16.08). Oregon's manufacturing industry is outpacing national growth.

As Patrick Kraft, CMfgE, Faculty, Department Chair and Machine Manufacturing Technology department at Portland Community College (PCC) wrote in his letter of commitment: "We know the program will support the development of career pathways that lead to high wage and high demand occupations. Oregon is facing a critical shortfall of youth in the manufacturing pipeline, due to both retirement of aging technicians, and growth of industry markets." Our proposal will build the student and educator pipeline to high wage and high demand advanced manufacturing careers by providing students on-the-job training using industry approved equipment, dual credits articulated with PCC, and career-related learning that includes

---

<sup>3</sup> <http://www.worksystems.org/research/advanced-manufacturing-sector-report-2014>

industry tours, mentors, and internship experiences. With the vision of creating a premier program and opening accessibility to all of our Hillsboro high schools and partner districts, elementary and middle schools, we aim to prepare tomorrow's manufacturing leaders.

As outlined further in Section L: Communication, HSD has developed a series of strategies to communicate the purpose and goals of the program to students, families, and the community. The high wage and high demand pathways will be linked to communications around the Manufacturing Hub materials through avenues including the website, open house events, family nights during forecasting at each high school, Community tours, and via local media outlets.

## **I. Equity**

HSD serves a diverse population of students with 51% students of color. Further, HSD has scored "not meeting" in the annual ODE CTE Report in terms of percentage of nontraditional students who participate in the district's CTE programming. However, HSD has a history of closing gaps as evidenced by the work they've done to create dual language programs that are eliminating gaps for English Language Learners. The district will apply that same pressure and expertise to close gaps for historically underserved students in their CTE programs. If funded, HSD's goal is to increase the number of students of color served within the CTE manufacturing program, with a specific focus on recruiting, supporting, and retaining the significant Hispanic/Latino student population, female students, and students in alternative education programs. To this end, HSD has multiple strategies it plans to pursue: 1) partnering with Worksystems, Inc. to serve students in the Sector Pathway Training program who attend alternative education settings; 2) leveraging programs such as Adelante Chicas that already

working within Hillsboro middle and high schools that target Hispanic/Latino and female students; and 3) develop intentional student and family outreach mechanisms.

1) Partner with Worksystems, Inc. to expand program to Sector Pathway Training Program. Through the partnership with WSI, an additional cohort of approximately 25 Sector Pathway Training Program students from alternative school settings in HSD, Tigard-Tualatin, and Beaverton will have access to the program. The WSI cohort are students who have historically been underserved and have not had success in a traditional school setting.

2) Leverage programs in HSD that target underserved populations. In order to reach students who have not participated in the past, HSD will collaborate with programs already working in the district that have a focus on STEM programming for historically underserved students including: Adelante Chicas, Digital Connectors, and Tech Wizards through Oregon State University's extension programming. To support this effort, a representative of Adelante Chicas will serve on the advisory for this program. These three programs offer culturally responsive pedagogy and are an avenue to recruit greater numbers of historically underserved student populations, with a specific focus on expanding the reach to more Hispanic/Latina students.

3) Develop intentional student and family outreach mechanisms. The planned afterschool and school visit programming for 380 middle and elementary school students will build a pipeline of interested students with an emphasis on reaching historically underserved students. As highlighted in the letters of commitment from Brown Middle School and Reedville Elementary, both schools serve a large population of students of color and economically disadvantaged students. Mr. Morley has already begun forming student advisory groups consisting of members of HSD's diverse community to help provide input and suggestions to



continue to expand the recruitment, support, and retention of historically underserved students in the CTE manufacturing program. Finally, as outlined in Section L: Communication, the Center will host open house events, create bilingual outreach videos, and create a high school to feeder school mentor program aiming to attract and support historically underserved students.

It is the intent of the manufacturing hub to provide Hillsboro and partnering district students who have been historically underserved greater access, support, and a rigorous diploma to career pathway in manufacturing.

## **J. Diploma Connections**

The manufacturing and design center will help all students meet the Oregon Diploma requirements and pursue high wage, high demand career pathways. In support of the core academic credit requirements, the program will reinforce the Next Generation Science Standards 8 practices and the Math Common Core 8 practices through the real-world problem solving and simulated hands-on manufacturing courses. The career related learning experiences both within the lab and via industry internships, job shadows, and mentoring opportunities will support the Essential Skills development. As an example, students will develop the following Essential Skills: using technology to learn, live, and work; demonstrating personal management and teamwork skills; and demonstrating civic and community engagement.

Hillsboro will build on its existing supports to personalize education for students in this program. Currently, each student in HSD creates an educational plan and profile in middle school that follows them through high school. Students engage in a series of career exploration avenues to build their plan of study in high school. The program's aim of developing an expanded horizontal and vertical pipelines of students will rely on these individualized plans to

expose and help students pursue their interest in high wage, high demand manufacturing and design pathways.

Expanding the reach of the manufacturing program to address the needs of historically underserved students in achieving the diploma is a central goal of the proposed center. The premier facility is focused and committed to serving underrepresented student populations within and outside of the school day through partnerships with other Hillsboro high schools, Banks, Worksystems, Inc.'s Sector Pathway Training program, and the middle and elementary feeder school programming. All of the participating high school students will be able to earn dual credit for their high school diploma and credit toward Portland Community College. High school students will work with industry partners and in turn have additional adult support and mentoring to encourage diploma completions. As a result of additional career related learning opportunities students will first hand see the diploma to industry connection.

#### **K. Sustainability**

The Manufacturing and Design Center is designed to be financially sustainable and to ensure enduring systems change. The proposed budget will serve to revitalize CTE through investments in equipment, staffing, and expanded partnerships to create the robust lab environment. Beyond the one-time investments, the sustainability plan centers on supporting on-going lab management and access beyond the regular school day, estimated at \$50,000 annually. HSD has identified four primary sources of funding to support the program sustainably: ODE CTE Program of Study Sustainability Funds, fundraising and profits from sales of student created work, in kind funding via HSD's STE(A)M afterschool programming, and facility use fees. As is evidenced in the budget, significant in-kind contributions will support the Center during and beyond the grant cycle. HSD is also committed to providing in-kind transportation

and support to align schedules so that all high school students across the district have access to the Center.

In addition to planning for fiscal sustainability, HSD will invest in on-going collaboration across the partner organizations to maintain and deepen investment in the program. HSD's College and Career Coordinator will continue to collaborate across boundaries to strengthen partnerships with HSD CTE teachers and staff, postsecondary, school/district, industry, and other community partners. Given the commitments made by partner organizations for this project, HSD will continue to work with the invested group of partners to maintain and grow the Manufacturing Center. Finally, by building a pipeline of students and educators invested in the Manufacturing pathway, HSD will continue to seed and grow lasting commitment to the project to achieve the intended impact.

#### **L. Communication**

HSD will dedicate staff capacity and a set of strategies to communicate the purpose of the manufacturing career pathway and program to students, parents, school staff, and the community. To this end, HSD is investing 0.2 FTE of College and Career Coordinator's time to support this grant. The College and Career Coordinator, Brooke Nova, will leverage her role of overseeing CTE programs and her regular meetings with Counselors and Administrators from across the district to communicate the purpose and goals of CTE programming, and plans to use existing meeting forums.

There are a number of existing communications channels that will be harnessed including the HSD College and Career Pathways website, district and school newsletters, and Century High School's annual printed course catalog. The College and Career Pathways website already serves to inform students and families how to become aware, eligible and prepared for the future

including a feature video of Mr. Morley's manufacturing and engineering programs of study. The CTE pathway programs will be also highlighted through parent nights and forecasting at all participating HSD high schools. Additionally, the College and Career Coordinator has developed a set of Pathway Professional Learning Communities (PLC) and communications materials for students and parents which will be leveraged for the proposed manufacturing hub.

HSD plans specific outreach strategies to reach students who have been historically underserved in the manufacturing career pathway, focusing on females and students of color. HSD plans to work with partner organizations and programs such as Adelante Chicas, who serve targeted populations, to reach historically underserved students. Key activities include:

- Hosting open house events at the Manufacturing Hub semi-annually to current and potential parents, families, industry partners, and the broader community in which students present their learning and their work
- Creating at least 6 bilingual outreach videos highlighting the opportunity by spotlighting students, career-related learning experiences, and projects to be used in outreach and forecasting materials.
- Partnering with the Hillsboro Tuesday Market so that students will be able to sell the products developed to the broader community and showcase their talents and skills.
- Creating a mentor program through which high school students mentor middle and elementary school students during afterschool and weekend workshops and visit classrooms to share a student's perspective on the manufacturing pathway.

Finally, to reach the broader community, HSD began Community Tours last year that have successfully engaged and exposed community partners in the pathways. HSD also engages local

news outlets to spread the message. The Manufacturing Lab will garner attention as a hub of industry-standard equipment and as students take on increasingly complex projects.

## **Bonus Narrative**

### **B. Middle School Component**

The middle school and elementary school components of the proposal are integral to the proposed plan to revitalize CTE across Hillsboro. The Center will not only serve as an industry-standard learning environment for high school students in the region, but also as a space accessible to the elementary and middle students to gain exposure to the field. HSD aims to build a pipeline of 380 middle and elementary school students from Century HS's feeder schools who gain hands-on lab experience during the grant cycle. HSD recognizes that it is critical to reach students early in their academic careers in order to ignite their interests in career pathways such as manufacturing. Through an emphasis on reaching historically underserved student populations, HSD hopes to create a new generation of students who enter high school exposed to and excited about the high wage and high demand manufacturing CTE pathways.

The Center will offer afterschool programming to middle school students, enabling them to access to new technologies and manufacturing techniques. Specifically, Brown Middle School students who participate in the Oregon Mathematics Engineering Science Achievement (MESA) program focused on STEM education will visit the Center throughout the grant cycle. Center staff and participating high school students will mentor middle school students to assist them in learning to use the technologies and in using design software to develop their projects. Further collaboration with Brown Middle School is planned in partnership with the Gateway to Technology instructor and STE(A)M coach. Mr. Morley and mentor students will also host visits to the Center and will bring hands-on manufacturing lessons to middle school classrooms. Similar connections are planned with elementary schools. Finally, through the district funded STE(A)M coaches at each HSD school, the grant team will coordinate additional opportunities to



build and expand the link between elementary, middle, high school and career manufacturing pathways.

### **C. Out of School Time Programming**

Extending student access to CTE activities beyond the normal school day is an integral component of the Center proposal. Through funding for additional staffing, the Center will be accessible for regular afterschool programming and weekend workshops. Specifically, partnership with Century's feeder school, Brown Middle School, will provide hands-on manufacturing lab experience for students who do not currently have access for at least 100 students at the Center and an additional 100 through school visits. By having the lab open outside of school time, the Center staff will be able to support teams in activities such as First Robotics, Oregon Game Project Challenge, and Oregon MESA. The out of school time will allow for the expanded formation of clubs in the CTE manufacturing field, particularly with an emphasis on reaching historically underserved students, such as Multicultural Tech Club and Enabling the Future. Supporting outside school time will also allows industry volunteers to engage more frequently with students.

Six weekend workshops during the grant cycle will allow for significantly more high school students to access the facility and earn dual credit. The Center team projects 180 additional high school students will gain 1 dual credit through participating in 2 5-day weekend workshops during the grant cycle. HSD envisions the Center as a space for industry, postsecondary, educators, students, families, and community to explore and engage around the field of manufacturing.

#### **D. Focus on Regional, Statewide or System Changes**

Despite being the fourth largest district in Oregon, Hillsboro School District does not currently have an industry-standard manufacturing facility. Creating the Center at Century High School will extend the opportunity to access rigorous manufacturing CTE programming to 7,098 students across Hillsboro, Banks, and students participating in Worksystems, Inc.'s Sector Pathway Training Program from across Beaverton, Tigard-Tualatin, and Hillsboro. As a hub for manufacturing, the Center will reinvigorate and reconnect the schools with the manufacturing industry that is rapidly growing in the region. The proposal will develop an elementary, middle, and high school pipeline to CTE programs of study, postsecondary attainment, and high wage, high demand manufacturing occupations. HSD envisions preparing students to be the most marketable and desired employees of the burgeoning industry surrounding the district, aptly coined the Silicon Forest. The Center will not only extend hands-on lab access to a broad set of students, but will also extend the number of high school students in the region who gain dual credits with Portland Community College from 200 to 430 students.

The commitments made by partners will support the development and growth of the Center. In particular, key collaboration with Portland Community College, local industry partners such as BDE Manufacturing, Worksystems, Inc., and the Hillsboro Chamber of Commerce will deepen the connection of school to career. It is HSD's hope that the Center serves as a model that can be replicated across Oregon for how to link core academic work with simulated real-world manufacturing learning and training so that students move seamlessly to discover and pursue high wage, high demand careers that support the future of our state.

[About Us](#)[What We Do](#)[News & Events](#)[Get Involved](#)[HOME](#) > [BUSINESS, CED, FINANCE, INCLUSIVE, PROSPERITY](#) >[INCLUSIVE STARTUP FUND](#)

# Inclusive Startup Fund

In early 2016, an expert Advisory Committee named Portland-based [Elevate Capital](#) as the management team for the newly created Inclusive Startup Fund.

The Elevate Capital team includes Managing Director Nitin Rai, Robin Jones Maloney (Venture Advisor) and Eric

Boothe (Venture Associate). Collectively, the team has more than 30 years of professional experience and has led investments in dozens of startups.

The fund provides early-stage investment capital and mentoring to local high-growth companies founded by underrepresented groups across a variety of industries. Prosper Portland and Multnomah County each contributed \$500,000 and Oregon Governor Kate Brown and Business Oregon committed \$250,000 to launch the fund in 2015.

The Advisory Committee consisted of the following members: Gustavo Cruz-Chair (Farleigh Wada Witt; Prosper Portland Board); Diane Fraiman (Voyager Capital); Nita Shaw (Micro Enterprise Services of Oregon); Ana Andueza (Angel Oregon); Jason Gershenson (White Summers); Rick Turoczy (Portland Incubator Experiment); Monica Enand (Zapproved; Oregon Growth Board); Paula Hayes (Hue Noir).



In August 2016, Elevate Capital announced that it has completed the first close of its \$3 million Elevate Inclusive Fund and \$10 million Elevate Capital Fund and has made investments in its first cohort of six women and minority entrepreneur-led startups.

8/31/16: [PDC partner Elevate Capital announces investments in minority and women-owned startups](#)

1/12/16: [Portland-based Elevate Capital to manage Inclusive Startup Fund](#)

8/19/15: [PDC, Multnomah County, and State of Oregon Commit \\$1.25M to Inclusive Startup Fund; Kick Off Search for Fund Manager](#)

Share This Story, Choose Your Platform!



## Related Projects



### Prosper Portland Business Finance Programs

April 24, 2017



### Commercial Property Redevelopment Loan Program

April 21, 2017



### Cluster Initiatives & Industry Partnerships

April 21, 2017



Prosper Portland  
222 NW 5th Ave |  
Portland, OR  
97209

P: 503-823-3200 | F: 503-823-3368

For  
Businesses  
For Job  
Seekers  
Resource  
Library  
Events  
Calendar

About Us  
What We Do  
News &  
Events  
Get Involved



© 2017 Prosper Portland | [Privacy Policy](#) | [Site Map](#)

## Circuit News



## The road to full representation: a study on retention and progression

Posted by [Vasquez, Krista](#) in [Circuit News](#) on Jul 26, 2016 8:40:01 AM



Danielle Brown and Barbara Whye discuss a new report on URM retention and progression—and the immediate act we're taking to improve.

[Read Full Article](#)

19279 Views

Categories: Business & Strategy

Tags: diversity and inclusion, multicultural representation and progression

Average User Rating  
(0 ratings)

Your Rating:

**5** HELPFUL      MOST LIKED

217 Comments

1 ... 5 6 7



Baggett, Robert J Jul 27, 2016 1:33 PM (in response to Glazier, Spencer)

The key piece of information, for me, is the following: "But Google's data indicated that psychological safety, more than anything else, was critical to making a team that into account, it worries me to imagine the effectiveness of the company overall.

## Actions



Stine, Jeffrey M Jul 27, 2016 1:50 PM

Have we considered discouraging males from pursuing engineering in the first place. I could speak at various colleges, and have the diversity problem solved by 21

## Actions



Jasniewski, Joe Jul 27, 2016 2:06 PM (in response to Tittsworth, Stacy)

Interesting you can do a "ctrl f" search for the word "bigotry" on this page and \_nothing\_, but that's exactly what is at the root of such jokes and comments you're r  
Also, no one mentions "arrogance" anywhere, which could translate to contempt of others; perhaps all those "poor workers" people over 40 are, at least in someo  
minded belief. So is it "inclusion", the fancy new term we need to take on, or old-fashion bigotry and arrogance we need to eliminate?



Actions



6

Strayer, Jayson Jul 27, 2016 2:18 PM (in response to Damer, Krista)

This (feeling oppressed) seems like an arbitrary and condemning test to know if you are biased (a closet racist/sexist/ageist/whatever). Here's a bunch more tests that roots in science: <https://implicit.harvard.edu/implicit/selectatest.html>

Actions



4

Weisbord, Dave H Jul 27, 2016 3:01 PM

Apparently no one else sees the humor in discussing diversity retention within a company that just dumped 12k people, most of whom had done good jobs for me suppose that most of those 12k were not the folks we want to retain :) While Intel may not meet the legal definitions of age discrimination we all know that the rec those from last year were age-based. But we don't care about that since those aren't the people we want to retain. And frankly I firmly believe Intel has a right to hire whomever they want but please don't tell me that the goal is diversity when it's clear that the only old white male BK wants to retain - is BK :)

Actions



1

Meinecke, Jeffry Jul 27, 2016 3:22 PM (in response to Garcia, Khalfani)

I like how you don't address what Jeff said about Government funded research is flawed. As quoted by Jeff "Government agencies will often ask for a study with a premise, and if you do the study and don't go along with the premise (which often is backed by a government agenda that is seeking a study to support it), then do not get support in publication of the study or funding for future studies."

Actions



1

Zeller, Geoffrey S Jul 27, 2016 3:30 PM

First Barbara and Danielle tell us that employees are being hired and/or promoted based on skin color and gender due to the "like likes like" phenomena (AKA a cliché just googled it). She says "Data and neuroscience show most humans tend to gravitate toward people that we have more in common with." Barbara even says she will exploit this trait for "building more diverse teams where we have gaps." Then literally a few paragraphs later Barbara says "Nobody at Intel gets promoted because of color or their gender." Can anyone explain this?

Actions



2

Bork, Jon Jul 27, 2016 3:52 PM (in response to Brown, Danielle M)

The challenge for me is with the question "to agree that diversity leads to better team outcomes". Can I say that if I had the perfectly diverse, inclusive team (per US Affirmative Action definition), that I could guarantee a better team outcome than with a 100% URM or Asian team (for example)? No! Nor can I say that I can ensure it produces a better product, a faster schedule, with higher quality or do the same work with less resources, which are some definitions of a better outcome. How would I make a better workplace? Yes.

Actions



4

Qi, Tong Jul 27, 2016 4:18 PM (in response to Bork, Jon)

The most diverse city in the Pacific Northwest, Tukwila, WA, which is also ranked 11th most diverse nationwide, is the most dangerous city in America in 2016, leading crimes per capita. Why do you think more diversity would make anywhere a better place?

Actions



2

Ramaseshan, Sathyaprasad S Jul 27, 2016 4:19 PM

Hi Danielle/Barbara, I have an alternate hypothesis for White/Asian managers not viewing diversity favorably on your survey. There has been a lot of focus on standardization/convergence of tools, methods, and work flows at Intel over the last couple years. As you may already know, these efforts are targeted at promoting and removing redundant effort. Given this environment, employees are generally expected/encouraged to do things the "same way". Due to this, I hypothesize that they might feel that diversity might not be as helpful in the day-to-day due to structures and processes that are in place within our orgs. White/Asian managers showed up on the survey as being less appreciative of diversity probably because there is a larger number of them at Intel. Thoughts?

Actions



Robles-soto, Miriam C Jul 27, 2016 4:42 PM

3

I agree that Intel should hire the best candidates regardless of their race, age or gender. But I firmly believe that the equation to find the best candidate is a conjunct "technical knowledge" + "having the skills to work as part of a team". The ability of working with others, of bringing the right attitude to the workplace, the ability to SYNERGY, is highly underestimated by those who only seek technical knowledge. I believe Intel's efforts to bring diversity are motivated by the NEED of diverse ic creativity and diverse problem solving solutions. We are never going to achieve growth if we keep our ideas to ourselves and fail to work as a team. I appreciate In open a door to those candidates who would otherwise be skipped by subconscious bias. As a URM I can tell you I have experienced that "bias" or "discrimination" in jobs, where my mentor would chose to train my male coworker because he felt that I would soon leave my job to go home and have kids. I can see some of you d the steps Intel is taking to bring diverse talent, but I can tell you, if it weren't for this initiatives, it would take decades for people to open their minds and see that p other races or genders are just as talented as everyone else.


Actions

1

Ikenberry, Myles A Jul 27, 2016 5:30 PM

"Every single employee at Intel deserves to... feel like they matter, that their view are valued, and work in a place where they can be themselves." I like that a lot, it s much better than "Everyone is replaceable."

Actions

2

One of the best posts I've seen in a long time. Kudos!

Actions

4

Knauerhase, Robin Jul 27, 2016 7:07 PM (in response to Weisbord, Dave H)

Totally anecdotal experience, but from people I know, the 12K (ISP, VSP, \*and\* ERP) included diverse people as well as "white males".


Actions

4

Knauerhase, Robin Jul 27, 2016 7:14 PM (in response to Dhillon, Hardeep S)

I have often used this to illustrate the advantages/privilege that people have and may not realize. <http://thewireless.co.nz/articles/the-pencilsword-on-a-plate>

Actions

4

Knauerhase, Robin Jul 27, 2016 7:21 PM (in response to Chua, Fiona)

I think it's important to repeat that none of this has talked about giving jobs/promotions based on a target. The idea is that as a TF or URM, it's increasing your cha rewarded for your abilities and track record in a way that isn't biased against you.

Actions

7

Gregory, Sarah C Jul 27, 2016 9:03 PM (in response to Pohle, Glen V)

It was certainly the case for Hillsboro. I was probably part of the last generation of suburban kids who would get up in the summer and walk down to the corner at a bus that would go to some farm where we'd pick produce - usually berries, but sometimes corn or other crops - until early afternoon, then get handed some cash on the bus to head home. Most of the farms I went to were in then-rural Clackamas County, but a few were in Hillsboro, too, on land that's likely now part of Intel. T mid-80s; nothing my teenager can fathom now.

Actions

## Circuit News



## The road to full representation: a study on retention and progression

Posted by Vasquez, Krista in Circuit News on Jul 26, 2016 8:40:01 AM



**Danielle Brown and Barbara Whye discuss a new report on URM retention and progression—and the immediate action we're taking to improve.**

[Read Full Article](#)

19279 Views

Categories: Business & Strategy

Tags: diversity and inclusion, multicultural representation and progression

Average User Rating  
(0 ratings)

Your Rating:

5 HELPFUL MOST LIKED

217 Comments

inside Blue

Home

Activity

Browse ▾

Explore ▾

Apps ▾

@ 1



2

Intel is not the first large organization to confront this issue. During the last century, American universities came to rely heavily upon tests like the SAT to screen applicants. They claim to measure academic preparation, these tests are mostly just proxies for IQ. They show large, persistent differences between races, just as IQ tests do. I argued that the tests have "cultural" bias, but it is difficult to explain how Europeans produced tests that are biased in favor of East Asian cultures. The concept of race has been criticized, but it appears that Intel accepts the concept of race enthusiastically, and is eager to classify applicants and employees based upon that concept. The concept of race of the universities would therefore appear to be highly relevant to Intel. In order even to approach a racial distribution approximating that of the population at large, Intel had to place a heavy thumb on the admissions scale. And the result has been, that the racial disparities present in the population at large are reproduced in the Intel population. It is, I suppose, arguable that Intel's current hiring practices are not selecting for IQ, or that the abilities measured by IQ tests are not important to the success of Intel. I will leave it to others to make those arguments.

Actions




2

Baker, William W Jul 27, 2016 10:41 AM (in response to Glazier, Spencer)

Had to stop reading when the incredibly-biased political ads popped-up.

Actions





5

Powell, Michael D Jul 27, 2016 10:45 AM (in response to Koppel, Tali)

To clarify, I'm not asking for the market availability numbers (e.g., what the MA of white males is), I'm asking for the actual percentages of groups e.g., white and Asi Intel. If we're going to show how under-represented some groups are, we should be transparent and show exactly who is claimed to be over-represented and by f The current reports gloss over that detail. As for the ISP data, I think that is very important to release. I have heard anecdotal evidence that ISP disproportionately females/URMs and anecdotal evidence that it disproportionately impacted white/Asian males, particularly those over 40. Clearly both speculations cannot be true released the data on ISP impact for VPs and also grade 9+ vs the rest of the population, I think this data should be released at least internally. It would replace spe facts. And given that part of our EB/APB is based on diversity retention, if we're going to lose (or gain) that kicker as a direct result of ISP, we should know.

Actions



2

Yang, Tsung-Han Jul 27, 2016 10:48 AM (in response to Blodgett, Jeffery R)

very well said. The fundamental contradiction between general equal opportunity hiring guidelines and preferential hiring/promotion need to be addressed. I do n clarifications yet.

Actions



6

Johnson, Derick A Jul 27, 2016 10:51 AM (in response to Rodriguez, Eric)

This was very well put, Eric. I think one of the hardest parts about this is knowing that you can only control your own behaviors, and only suggest that others start p has to come from within, and because of that, we have to do a good job convincing others why they should participate so that they can feel the same passion arou do. It's hard when people might be shielded from things outside of their own "experience" bubble, which is why it's so important to get out of that bubble and lister of others. That's been the best thing for me, just hearing those stories so that I'm more aware of things that are happening around me that I may not have otherwis

Actions



5

Garcia, Khalfani Jul 27, 2016 10:54 AM (in response to Manny, Jeff M)

Jeff: The research studies I cite are not my opinion. They are research studies. Your "2 decades of experience" however, is NOT a research study and IS solely your c

Actions



2

Damer, Krista Jul 27, 2016 10:59 AM

If you have lived with unnoticed advantages your whole life, equality feels like oppression.

1 person fo

Actions



3

Shirts, John A Jul 27, 2016 11:02 AM

Striving for greater diversitv and equitv is uneauivocally good for Intel and good for people. My concerns are two-fold: 1) the URM-focused definition of diversitv is

inside Blue

Home

Activity

Browse

Explore

Apps

@ 1



You can argue that these diversity measures matter much more to actual job performance and they have lost/won more jobs for me than my gender and ethnicity. around these too. Introverts tend not to be as good at first impressions as extroverts. Biases are too numerous to mention. Weight, age, religion, marital status, and and on. Bias around race and gender undeniably exist. But focusing on certain types of biases in hiring outcomes only creates more blind spots. For #2, there's notl with measuring gaps at Intel to the available hiring pool. But quotas poison the well and destroy credibility in the hiring process. An undue focus on the justice of tl puts far too little emphasis on the justice of the process. I applaud the use of panels for hiring and any other measures that increase the odds of an unbiased hiring Merit should be our primary concern.

2 people fo

Actions



3

Adams, Nicholas J Jul 27, 2016 11:11 AM (in response to Glazier, Spencer)

Definitely worth the read. I think this speaks volumes to team building.

Actions



2

Chang, Kai Jul 27, 2016 11:12 AM (in response to Garcia, Khalfani)

Just a note here, the article you linked only surveyed women in executive roles. That is a very self-selected population that you would expect would be biased tow

findings.

Actions



6

Blodgett, Jeffery R Jul 27, 2016 11:15 AM (in response to Yang, Tsung-Han)

Thanks. Unfortunately, I do not expect to see any clarifications any time soon. This is a question that has been repeatedly asked by myself and others ever since the initiatives and goals were announced. To my knowledge, no one in any official capacity has even addressed this question. Even those speaking unofficially in discussions have largely avoided it.

Actions



3

Young, Sonji R Jul 27, 2016 11:21 AM

Thank you Danielle, Barb, and all contributors to this research. You've equipped everyone to remain informed and engaged in our journey to parity, but also created a culture where all employees can bring their authentic selves. D&I (Diversity & Inclusion) are both sensitive and timely topics that seem to generate a variety of opinions among employees across our company. Many people feel threatened by the topic, perhaps because they don't see themselves in the list of likely contributors. Despite the brain power we possess at Intel, I'm still astounded by the number of "geniuses" that don't see inclusion as a value. How can we come to work each day and overlook to whom our work and success are connected. The important questions we all should ask ourselves regularly include: Do we consider ourselves as leaders or on the path to leadership? And if so, what is required of us to reach excellence in leadership? Essentially, inclusion is the glue that connects leadership and excellence. "Smart is not enough" these days, and it will require more from all of us to remain relevant as a global leader in our industry, from both the employer and contributing employee stance. (Everyone: Read the book "Smart is not enough"). I'd love to know what managers across Intel are actually doing to strengthen our inclusive muscle. Hiring is a thin equation, with retention and progression being critical components as well. It's great to get people in the door, but if managers and teams are busy strategizing on how to demonstrate that someone doesn't "fit", we're left further behind than ahead of the challenges. I feel empowered to motivate our PEG businesses to recognize and lead by example (at all experience levels) for their ability to create genuinely inclusive environments. Mohsen in MVE does a phenomenal job and we need to see more leaders get the spotlight for their contributions. Unfortunately, there aren't enough Mohsens out there. If we are going to rise from ACT, inclusion will need to be not just a word in our vocabulary, but an actionable asset that we practice and value. We're not quite there, but we can get there!

Actions



5

Dhillon, Hardeep S Jul 27, 2016 11:22 AM

"We want to leverage a bit of this "like hires like" phenomena to benefit building more diverse teams. So while we are asking managers to eliminate "like like" hiring color/gender blind but we are encouraging URM managers to use this. I am sorry, I can't agree with different rules for different groups. This leads to more division and confusion."

Actions



5

Dhillon, Hardeep S Jul 27, 2016 11:32 AM (in response to Damer, Krista)

I am trying to notice what unnoticed advantages I had my whole life as an Indian kid/male growing up in US as compared to URMs/female. Which advantages are you recognizing?

Actions



6

Baker, Jeff A Jul 27, 2016 2:15 PM

[Brown, Danielle M](#) & [Whye, Barbara H](#) Apologies if this has already been addressed. In the slide titled "URMs are experiencing Intel's environment differently", it appears to be shown for 5% or more. What is the baseline being used? Is it versus top score for that category or versus score for white males? Are there any categories where white males trail the category leader by 5 points or more? Can you provide the actual raw numbers? Thanks!

Actions



6

Blodgett, Jeffery R Jul 27, 2016 12:32 PM (in response to Fuentes, Linda)

Linda,

I understand that this is the company policy, however I am concerned that in practical application this policy is often bent, if not outright broken or ignored. From my perspective, it seems that Intel sets these company-wide goals for diverse hiring, and then expects each group to meet the goals. Then the groups (or smaller units) receive bonuses and other incentives tied to the goals, implement hiring practices designed to achieve those goals with little regard for the company's non-discrimination policy. It may not outright break it, but there are practices in use that are definitely in ethical gray areas.

For example, I have seen official internal communication regarding the specific hiring practices for some groups (not my own) which have dictated terms to hiring managers, such as requiring managers to submit written justification for hiring any "non-diverse" candidates. This may not specifically violate the letter of the non-discrimination policy, but it does not specifically require the hiring of one group over another, however it places an extra burden upon managers in that group for hiring non-URMs compared to hiring URMs, as such it certainly seems to be aimed at encouraging the hiring of some candidates over others based solely on race/ethnicity/gender/etc. Doesn't such a practice

least violate the spirit of non-discrimination?

Actions



Blodgett, Jeffery R Jul 27, 2016 12:51 PM (in response to Knauerhase, Robin)

By definition, a quota is a target number. How is hiring to a percentage not a quota? What exactly is the difference?

Even more so, Intel's goal is not that our hiring in a given year matches the available tech population of that year (that would be a reasonable and fair policy I could provided there were adjustments that took into account each site's local populace as a factor). instead the goal is that the entire company, including existing emplo in across decades of hiring and a vastly different market population, be brought to match the currently available tech population within a few short years. Mathem order to achieve this goal Intel must hire URM's at a rate higher than their market representation. Again, we have in effect set a quota.

Actions



Damer, Krista Jul 27, 2016 1:02 PM (in response to Dhillon, Hardeep S)

Unnoticed advantages: when you are growing up and the question is what you will major in for college rather than IF you will go to college at all. Or the fact that y the store and not be followed around like the staff is waiting for you to do something wrong. Or the fact that people don't give you a surprised "OH???" when you you are an electrical engineering major. Or the fact that the first emergency number that people call when a child needs something is the mother rather than the f

Actions



Damer, Krista Jul 27, 2016 1:05 PM (in response to Damer, Krista)

Or that you have multiple successful role models in different professions that are "like" you.

Actions



Blodgett, Jeffery R Jul 27, 2016 1:09 PM (in response to Tittsworth, Stacy)

Stacy, I'm sorry to see you leave; I'm sorry to see anyone leave because they were forced out under ACT, considering how poorly that debacle has been handled. I' you've experienced such terribly inappropriate remarks; those have no place in any professional environment. I have to say though that there is one part of your o disturbing. I may be misunderstanding, and please correct me if I am wrong (as I sincerely hope I am), but you seem to be implying that rather than make decisions individual merit, or the business needs of site or project cancellations, regardless of individuals' race or gender, you believe that ACT should have specifically avoid technical females and instead given them preferential treatment because of their gender?

There have been many of our friends and colleagues impacted by ACT, across the spectrum of experience, ethnicity, and gender. I hope that we can all have enoug both towards those who are leaving or have left and those remaining, not to make accusations of bias in this matter. Unless of course you have specific evidence o which should then be taken through the proper channels or to legal counsel rather than casually tossed about in an open forum discussion.

Actions



Anantharaman, Kapil Jul 27, 2016 1:15 PM (in response to Garcia, Khalfani)

I understand the government category. IF the belief is that more diverse teams will create a better intel, Then why stop at these 5 categories that the government u 3 people from vastly different parts of Asia (not to mention half the world population) are not diverse is I think a mistake and will lead us to be less diverse than wh striving for.

Actions



Blodgett, Jeffery R Jul 27, 2016 1:21 PM (in response to Damer, Krista)

I'm sure this might draw some laughs at my expense, but I honestly don't intend this for comedy's sake. When I was a kid, do you want to know who was my primar who inspired me to go into engineering? Geordi LaForge on "Star Trek: The Next Generation"; an African American (fictional) engineer, who was clearly of a very dif ethnicity than my own primarily "white" European heritage. I wasn't concerned with whether he looked like me; I liked what he did, and thought it would be someth that I could do. If we are really interested in fighting racism, rather than "there need to be more role models for youth that look like (certain group)", shouldn't our r "you should choose anyone you find interesting or inspiring as a role model, regardless of what they look like"?

Now if Intel would only develop an interstellar starship, I'd be set!

Actions







Charles, Gary Jul 27, 2016 1:28 PM (in response to Harris, Tom H)

You're right I did come off aggressive and I sincerely apologize for that and sure I do see how useful how diversity across Intel sites can help narrow the focus. But the article comes in to help you and I and everyone else take a look around us to become aware of our immediate surroundings to see how diverse our team or grc have the conversation with our managers. Whether you're in PG or AZ, Intel is focused on making the company diverse. I'm pretty certain there are exceptional tec FEMALES in AZ and PG who look forward to taking the next major step in their career at Intel.

Actions



Charles, Gary Jul 27, 2016 1:31 PM (in response to Navarro, Philip)

And that's what makes America the greatest country on the planet!!!

Actions



Thraves, Tim Jul 27, 2016 1:32 PM (in response to Sundararaman, Shyam)

One would think that personal anecdotes being used as evidence to generalize and demonize a broad swath of people would be generally looked down on. Espec article talking about inclusion. But, that's right... You're talking about "old" people, and it seems that is one group that it's fine to generalize about here.

Actions

1 ... 5 6 :

## Circuit News



## The road to full representation: a study on retention and progression

Posted by Vasquez, Krista in Circuit News on Jul 26, 2016 8:40:01 AM



**Danielle Brown and Barbara Whye discuss a new report on URM retention and progression—and the immediate action we're taking to improve.**

[Read Full Article](#)

19279 Views

Categories: Business & Strategy

Tags: diversity and inclusion, multicultural representation and progression

Average User Rating

(0 ratings)

Your Rating:

5 HELPFUL MOST LIKED

217 Comments

1 ... 5 6 7



5

Sundararaman, Shyam Jul 26, 2016 10:24 PM

I know this article represents all of the U.S and the world. One thing I would like to add from a hyperlocal perspective is that the cancellation of the air shuttle from Folsom is likely to affect retention rates in Folsom. Several ICs and managers have identified Folsom as a site to set up roots in based on the affordability, family-friendly nature, diversity (The Sacramento area is one of America's most woman, URM-friendly and quite unlike the other big Intel sites in the US; Source: <http://fivethirtyeight.com/most-diverse-cities-are-often-the-most-segregated/> ) and the ability to still grow within Intel as you are one quick ride away from other sites. I know Neil and BK business decision but this one definitely feels like something that would hurt retention of minorities and women in one major site.

Actions



5

Manny, Jeff M Jul 26, 2016 10:39 PM (in response to Garcia, Khalfani)

Hi Khalfani, You are entitled to your opinion, but I'm speaking from over 2 decades of experience in engineering, most of it at Intel and I can tell you from my perspective as individual engineers, we have to look for the best solution as I described. Allowing biases to get in the way usually sooner or later causes one to realize it will lead to solutions, or, at best, less optimal ones. In my experience, engineering peers on a team will often call one another out when one member(s) is not following the best solution or allowing his/her personal biases/agenda to take precedence .... the result will be a change to a better solution or, if a change is not made, the original path will be examined. My experience is that if biases start to become an issue, it is usually when management gets involved and allow politics to enter the equation and cause a solution/process/policy to not be followed. I think history also shows that to be the case -- those successfully involved in the sciences and engineering tend to stick to facts, data, and honor the scientific process (hypotheses tested and the results are measurable and repeatable by others). History shows that when those aren't honored/followed via personal agendas or outside influence that trouble begins. With respect to your example of hiring and bringing up a study, I checked that:

would just say that it is suspect in my eyes because the NAS is funded predominately by the government. Anyone close to government funding today who is honest that to get funding from the government for a study, you have to agree with the government's premise. Government agencies will often ask for a study with a specific and if you do the study and don't go along with the premise (which often is backed by a government agenda that is seeking a study to support it), then don't expect support in publication of the study or funding for future studies. Yes, it is corrupt ... and if one doesn't see the high level of corruption in our government today and political parties (especially the DNC given WikiLeaks data release), well I don't suppose one will ever see it. So I take your quoted study with a grain of salt, as well as that might be posted on the Intel site that would come from a government funded study ... especially during the tenure of an Administration that plays politics and has much reverence for the truth or calling a spade a spade. That being said, have any of these studies that claim as their hypothesis that systematic bias or what have they followed the scientific process and the results repeatedly and independently verified (hopefully without the corrupting influence of government funding) could we be selling fiction as fact because, at best, it is something that some want to prematurely believe in, or at worst, someone has an agenda to push?

Actions



2

Charles, Gary Jul 26, 2016 11:41 PM (in response to Harris, Tom H)

Huh??? Most people are here and you're waaay out there!!! From the onset of the article, the subtitle clearly says "a study on retention and progression". How much would you like to see from this study and most importantly how do you see it helping Intel meet its diversity/inclusive initiatives? Of the many points this article has to make 1) update us on our diversity/inclusion/retention progress report and 2) bring awareness to a collective effort to meet this 2020 initiative goal. A person's role within a social structure or at the workplace has a major influence on his or her behavior, attitude and actions. A subset Intel value (GPTW) is to promote a work environment that reflects a diverse workforce. I commend Intel for placing emphasis on this one specific value that quite honestly probably isn't a top priority at some tech companies. For the talent existing within the company, managers shouldn't be afraid to tap into a supply of skilled diverse workers whether in Penang or Ireland.

Actions



1

Martin Iii, Osborne A Jul 27, 2016 12:42 AM (in response to Brown, Danielle M)

Take a look at the front line managers in the G7-G9 range. Compare the number of direct reports and the diversity of the teams they manage. Group the results by being URM or not. Final comparison of interest would be their respective focal ratings. Possibly get a glimpse of two populations. G7-G9 manage most of the ICs. For G7-G9 managers come from the layer of management above. Managers of manager analysis would also be interesting.

Actions



2

O'Neill, Simon Jul 27, 2016 4:36 AM

That would be an ecumenical matter that would be an ecumenical matter!

Actions



1

Li, Jiawei1 Jul 27, 2016 5:17 AM (in response to Knauerhase, Robin)

The percentage IS the quota. It may be a more fair or natural quota, but it still meets all the definitions of 'quota'

Actions



1

Li, Jiawei1 Jul 27, 2016 5:31 AM (in response to Manny, Jeff M)

Higher relative to what?

Actions



5

Powell, Michael D Jul 27, 2016 5:40 AM (in response to Brown, Danielle M)

Hi Danielle: Two specific examples where I would like to see more data. In the mid-year and annual diversity report, instead of using "@MA" (at market availability) tables, please include the actual percentages for all categories. Second, when tabulating departures in the retention numbers for the next report, please separate voluntary and involuntary departures. It would be nice to see separate numbers for normal attrition, VSP, ERP, and ISP, but at a minimum ISP should be separated out from the rest. Finally, thanks to whomever updated the experience table in this article to include some numbers instead of just color-coded symbols.

Actions



2

Twohig, James Jul 27, 2016 6:07 AM (in response to Glazier, Spencer)

Super article. It goes to show you can never run away from common sense, but we keep trying!

Actions



4

Rodriguez, Eric Jul 27, 2016 6:31 AM

Team - I appreciate the effort to put together this report. I encourage all employees to look at this data from a different angle. When we read data centric reports li our immediate focus is to find where do we fit in to the data. Where am I represented or where is my green, yellow or red point. I encourage to look at it the other w ask different questions. The first question to came to mind when I took this approach is what can I do differently to create a more inclusive environment for our fer colleagues. At the end of the day, I can only control my behaviors and this data has helped me understand the environment and increase my awareness of the chall create a more inclusive environment. Thank you for empowering all of us in the role we play to support all of our colleagues and create a more inclusive company f generation of employees coming behind us.

Actions



4

Rodriguez, Eric Jul 27, 2016 6:38 AM (in response to Koston, Joseph)

Hi Joseph - These were "How likely do you agree" questions that can be found in the table. Therefore the green dots represent a population that was most likely to the red arrows reflect the population that was less likely and by how many more percentage points. Hope this helps. Feel free to let me know if you want to chat m slide or additional data, more than happy to.

Actions



5

Harker, Eric B Jul 27, 2016 6:38 AM (in response to Rodriguez, Eric)

That's a good point Eric. And I think this works both ways (ie, it is a two way street). Two often I see URM's who are uncomfortable, or simply don't consider, being n with their manager or peers. For a practical example, expanding who you invite or go to lunch with., or at a team off site or team builder.

Actions



5

Harker, Eric B Jul 27, 2016 6:51 AM (in response to Chua, Fiona)

I think Fiona we all would like to know that we got a job or promotion based on our abilities. I volunteered to serve in the U.S. Army I believe they took me because volunteered and didn't have a criminal record basically. . I believe I earned promotions and awards based on my skills and contributions. I went to a technical schoc I was accepted because my money was green. I eventually was offered a job at Intel, I assume, because I had the skills, education and work experience but also bec willing to get my foot in the door by taking a Compressed Work Week (CWW) night shift job (7pm-7am). I eventually got a Mon-Fri job because, I think, I was one of take what was essentially a pay cut (going from CWW to 'normal' hours resulted in pay differential that was negative!). And so on. I'd like to believe my success and my own. But, reality check....! Anywhere along the line my career, for good or bad, could have been influenced by my gender, my skin color, who I knew, who I did nc took a liking to me, who did not take a liking to me, or sometimes just being at the right/wrong place at the right/wrong time.... I feel overall, big picture, my career i my efforts and hard work. And You should feed the same. Wether you agree with the methods Intel has chosen to pursue or not, we all benefit from a more integra place, and a more integrated society/community/neighborhood. There is no simple, easy, conflict free way to pursue this, but it shouldn't detract one bit from your for what you have earned.

Actions



4

Rodriguez, Eric Jul 27, 2016 6:51 AM (in response to Tittsworth, Stacy)

Hi Stacy - I understand where you are coming from. Since we have publically been on this journey, some the comments made have been discouraging at times. Ho parent hat on and I am happy we are having this discussion now. The generation of employees that came before us heard these comments not only at work but at broader community. Now we can make a difference to engage in a conversation to ensure the next generation of employees do come into an environment that is r This is our opportunity to raise diversity and inclusion acumen for the entire company. I am confident Intel is a role model in this work and each one us, the 100k e Intel, have a role to make our company more inclusive and demonstrate this can and will change the world.

Actions



4

Koppel, Talli Jul 27, 2016 6:55 AM (in response to Powell, Michael D)

Michael, in the annual report on Page 9, i believe you can see the market availability numbers. Regarding exits, I'm not aware of any company (large or possibly ev releases departure/exit data externally much less going to lower levels of detail that are prone to blending as situations may cross categories due to retirements an factors.

Actions



4

Rodriguez, Eric Jul 27, 2016 7:03 AM (in response to Bennett, William A)

Hi William - Great question. Intel recently co-authored an awesome report addressing your question about financial impact for companies and teams that are more inclusive. Feel free to check it out here: <http://www.intel.com/content/www/us/en/diversity/decoding-diversity-report.html> If you want to talk about the report, p know. More than happy to schedule time to connect. Thank you for the question!

Actions



Willingham, Robert P Jul 27, 2016 7:17 AM (in response to Bennett, William A)

We can neither confirm nor deny secret government quotas that keep a company out of Tom Perez's office.

inside Blue

Home

Activity

Browse ▾

Explore ▾

Apps ▾

@ 1



Stahlman, Erik S Jul 27, 2016 7:33 AM (in response to Rodriguez, Eric)

Eric,

The 'Decoding Diversity' report largely reflects correlation effects, and there's little data (yet) on causation with regard to financial impact.

The report wouldn't take into account the financial impact from hiring from a smaller group of people that can command higher salaries due to their availability (all long run, the increase in the potential employee pool would lower salaries?),

There appear to be increased costs and opportunity impact to the processes involved in every internal transfer going through a formal process - what would take a month previously could now take a month or more.

There appears to be studies that show impact from diversity which would only have indirect impact on those numbers (summary page at

<http://economicsdetective.com/2016/07/costs-ethnic-diversity-garett-jones/>

Disclaimer, I'm non-diverse, so take this as being inherently biased.

Actions



Teshera, Tony Jul 27, 2016 7:46 AM (in response to Fuentes, Linda)

Looking at the data (both original and now updated), it's raising an interesting question for me. Is it that we have a small percentage of the diverse community that experiencing Intel differently, or that as a whole those communities are experiencing Intel "slightly less good" than white/asian males? These are very different problems if the data as presented is clarifying which (and perhaps I'm missing something). What I see are small single-digit differences in percentages (on both charts), which mean very different things depending on the distribution of responses. Perhaps looking at median vs. mean would shed some light. If median responses for diverse are similar, then instead of having a broad problem, we may have problem "pockets" that we need to understand better.

Actions



Crandall, David Jul 27, 2016 7:55 AM (in response to Brown, Danielle M)

Not sure what is already being done in this space, but one interesting thing that Google does is they assess whether the interviewer is good at assessing people. I wrote that if they see a consistent pattern of an interviewer "getting it wrong," they either train them or ask them to stop interviewing. I'm not sure if or how we could go about doing this, but it might shed some light on the 'like hires like' bias.

Actions



Jasnowski, Joe Jul 27, 2016 9:40 AM (in response to Yap, Sook Chin)

Just who gets to be who they really are - without some conformance to others' expectations - in any context? Someone totally alone, like a hermit maybe. But not personal, work, neighborhood, social or any other kind of relationship. Kind of a strange consideration, if you ask me...

Actions



Harris, Tom H Jul 27, 2016 9:48 AM (in response to Charles, Gary)

Bulk data is misleading, so I'm looking for details to clarify the frame of reference. It only makes sense that more Asians work in PG than AZ, so it's important, to me breakdown. Opening our discussion with a negative comment (you're way out there!) doesn't help the progression of the discussion. Thanks.

Actions




Strayer, Jayson Jul 27, 2016 9:53 AM (in response to Brown, Danielle M)

I would further hypothesize that age (especially length of service) impacted the results on the Intel experience survey. Those with longer service records can remember Intel with higher stock prices, less random lay-offs, and better benefits (that they may still enjoy by Grandfathering) while the more recent hires have received benefits and haven't seen the stock above \$40. Far more concerning to me, though, is that my best job candidates routinely choose Google, Microsoft, or Apple over Intel. I love to see a report out on what we are doing to attract the best talent relative to these companies that currently enjoy a higher profile than Intel. I feel confident that

enjoyed the same cachet as Apple right now, we could easily exceed our URM goals given the amount of focus we are putting into URM hiring and retention.

Actions



6

Blodgett, Jeffery R Jul 27, 2016 9:58 AM (in response to Godin, Leo G)

insideBlue

HomeActivityBrowseExploreApps

@ 1

hurdle? I have yet to see anyone give a satisfactory answer to this question. As it stands, our goal of parity and non-discriminatory hiring policies are at direct odds with each other. If we hire at parity, mathematically we will approach but never reach company-wide parity, as we hire over the course of decades, and the parity target will change every year. If we hire URM's at a rate above parity, we will eventually reach company-wide parity, but will do so at the expense of necessarily discriminatory hiring practices.

Actions



7

Navarro, Philip Jul 27, 2016 10:15 AM (in response to Harris, Tom H)

I do not think Europe cares as much as the US about this sort of thing. <http://fortune.com/2016/07/12/diversity-europe/>

Actions

1 ... 5 6



Circuit News



The road to full representation: a study on retention and progression

Posted by Vasquez, Krista in Circuit News on Jul 26, 2016 8:40:01 AM



Danielle Brown and Barbara Whye discuss a new report on URM retention and progression—and the immediate act we're taking to improve.

[Read Full Article](#)

19279 Views   Categories: Business & Strategy   Tags: diversity and inclusion, multicultural representation and progression

Average User Rating  
(0 ratings)

Your Rating:

5 HELPFUL   MOST LIKED

217 Comments

1 ... 4 5 6 7

- 3

St Pierre, Eric R Jul 26, 2016 5:10 PM (in response to Knauerhase, Robin)

Then realize that what you are saying is that ultimately you can't trust anyone to make an unbiased hiring or promotion decision. So you put in a system to manage. But then doesn't the data show that the overseers who are managing us to the number are also biased? So we can't trust them either? Once you give into the premise that we are all biased and no one can self assess accurately that they are not biased, then who is qualified to judge what the categories are that we divided into and how many companies should be in each category? Since under the premise that we are all biased, I can't trust myself and I can't trust the overseers of the system.

Actions
- 3

Lynch, James D Jul 26, 2016 5:12 PM

This is so SUPER amazing -- I love the call to action to active ourselves to create a more inclusive environment. We ALL have work to do to make Intel more inclusive and make a lasting sea-change in the technology industry.

Actions
- 5

Garcia, Khalfani Jul 26, 2016 5:14 PM (in response to Anantharaman, Kapil)

Intel, like most companies, uses the racial categories required for us to report our data to the federal government, specifically the EEOC - Equal Employment Opportunity Commission.

Actions

Commission.

Actions



Anderson, Ray Jul 26, 2016 5:16 PM

I am VERY proud that Intel is spearheading this initiative. Intel is dedicated to establishing a multi-national, multi-religious, multi-cultural, identity-plural project th most scientifically literate people within one space and reconciles group histories seamlessly. To the people calling efforts like this divisive, I'd just like to add some someone who recently graduated from college, I spent 4 years at a male dominated engineering school in which my roommates & peers often relied on essentialze of female ability. They usually articulated that 1.) there are biological differences in the sexes so there should necessarily be different outcomes in pay and workfor female engineering professors were more domineering, harsher graders, and only hired for diversity, 3.) female engineering students could easily get jobs simply fc female. I believe these are repugnant, sexist mischaracterizations, and I expressed so whenever this topic surfaced. Unfortunately, these gendered arguments were homogeneous space. That is, only applying that same argument to the dominant group (female students saying this about male students) would unveil how prejud comments were. That's because maleness was an unmarked norm in my college and people located external to that were deviant/wrong. These were men who cot of female technical aptitude as an ontology and regarded any case of it with tremendous skepticism. Without diversity initiatives like what's been elucidated here, r likely go on to perpetrate confirmation biases, reinforce glass ceilings, and state that they are "gender-blind" and only see merit (ironically, merit=gender).

Actions



Anderson, Ray Jul 26, 2016 5:17 PM (in response to Anderson, Ray)

To groups already occupying critical mass who still support diversity initiatives, I'll empathetically say this... I could only imagine what it's like to be thrown into the people embodied with a similar aesthetic to me dominate every major cultural, corporate, and political institution. Then see other social categories of people need initiatives, bathroom amenities, etc. I simply will never have access to the mental tax placed on those of you who forced yourself to see society through someone e and then chose to make space for otherness (URM, non-binary people, etc.). I thank you for situating your performance of maleness, straightness, Christian-hood, i dominant exclusion in a way that actualizes egalitarianism. I also extend my empathy to other URM, like me, who are too afraid to comment on these discussions d related fears, residential obligations, etc.

Actions



Garcia, Khalfani Jul 26, 2016 5:20 PM (in response to Henkel, Laurel)

That's right, Laurel. Robin, this short, animated video explains more about Market Availability: [http://employeecontent.intel.com/content/news/nonportal/management/connection/fullinclusion\\_7142015.html](http://employeecontent.intel.com/content/news/nonportal/management/connection/fullinclusion_7142015.html)

Actions



Chua, Fiona Jul 26, 2016 5:25 PM

I'm a female URM. Personally, I will prefer to know that I got a job or promotion based on my abilities and track record, instead of some diversity quota target.

Actions



Yap, Sook Chin Jul 26, 2016 5:27 PM (in response to Chua, Fiona)

Fiona, you are not URM. Asians in US are overrepresented. In Penang, your race is also overrepresented. If technical, your only diversity metric is your gender.

Actions



Noxon, Nicki Jul 26, 2016 5:45 PM (in response to Dhaliwal, Harsharan)

True Folsom was undeveloped before Intel, but it was not a preexisting diverse location - They were just naked hills in Folsom and Eldorado prior to Intel. A perfect an upscale neighborhood. It would be interesting experiment to see what would "grow up" in the area if we planted an Intel Campus in the middle of an innercity lo South Sac or Oakland.

Actions



Hsing, David Jul 26, 2016 5:51 PM (in response to Anantharaman, Kapil)

Yeah I'm not sure I'm gonna like any purported "Asian tech" any more than any purported "Asian Fusion food"

"So what's this food?"

"Asian"

"...and this tech?"

"Asian man tech, duh."

Actions



5

Garcia, Khalfani Jul 26, 2016 5:56 PM (in response to Hale, Alex)

Alex: Have you seen the picture of our Board of Directors? Executive Management? VP/Fellows? To make those "balanced", as you say, we'll have to add A LOT more Great idea! :-)

Actions



5

Garcia, Khalfani Jul 26, 2016 6:23 PM (in response to Manny, Jeff M)

Jeff: Regarding your claim that "...most of us who have been in engineering awhile have trained our minds to eliminate such biases for the most part." While I'm sure like to believe that, there is ample research that shows that there is actually lots of bias in engineering and the sciences. For example, one study published in the Proceedings of the National Academy of Sciences (PNAS), vol. 109 no. 41, 16474-16479, found that scientists sent IDENTICAL "male" and "female" fictional resumes rated the "male" higher on competency, were more willing to mentor the "male" candidate, were more likely to hire the "male" candidate, and proposed a higher starting salary for the candidate. You can read about that study and many more on my Inside Blue blog here: <https://soco.intel.com/blogs/ShowMetheData/2015/05/11/workplace-discrimination-external-research-shows--short-version>

Actions



3

Ng, Khin Hooi Jul 26, 2016 6:50 PM (in response to Yap, Sook Chin)

I think the main question was not answered. How to ensure job or promotion is based on abilities and track record, instead of diversity quota target?

Actions



10

Yap, Sook Chin Jul 26, 2016 7:21 PM (in response to Prout, Lisa J)

Lisa, your link points out that in Britain, Asian typically covers just the people from the South Asian region not the entire continent of Asia. Unless you think that So Asian continent.

Actions



1

Perez-paz, M N Jul 26, 2016 7:29 PM

I want to recognize the effort from Danielle and Barbara and their teams to quantify how Intel is looking on diversity. I do believe the way to start change things is not get discouraged in spite of the critics... big movements on history started with a lot of critics... and open discussion. I am personally surprised to see the managers (the others are less surprising). On that graph, only "white" are more prompt to be chosen as managers (wonder if culture, strength, education, language, bias...or otherwise). In fact, other cultures seem to do better on the Intel fellow path. Do you have any data that points why is that happening?

Actions



2

Fought, Eric T Jul 26, 2016 8:22 PM

I think this article is only fair if Barbara, Danielle, HR would include the hiring targets going forward. Then we can have an open discussion on inclusion. Saying what happens or how it is going to happen doesn't do the process justice. We need to see raw numbers. Let's have the real data to discuss. Not a spin. Engineers are professional, data is easy to figure out. But when we only get bits/pieces then people are misled. Or is full transparency in this new environment too much to ask?

Actions




6

Brown, Danielle M Jul 26, 2016 8:32 PM (in response to Fought, Eric T)

Hi Eric: We share quite a bit of data on hiring in our semi-annual diversity reports (archived at [intel.com/diversity](http://intel.com/diversity)) as well as goals, market availability and representation statistics. Lots of detail in the reports and in the data addendum packages. Feel free to dive in and let me know what's missing. I do want to point out that this for the study referenced in the above article, HIRING was out of scope. It was a CSD on retention and progression. Full transparency not at all too much to ask, we pride ourselves on it. I also do want to point out we had a team of data scientists and data visualization engineers who helped us with our study and led our research. Our methodology was rigorous and we spent a lot of time poring over the detailed data, which we used to formulate our story and strategy (the point of the CSD).

Actions




6

Brown, Danielle M Jul 26, 2016 8:36 PM (in response to Stahlman, Erik S)

Hi Erik: Very good points you call out. We are just now starting to collect metrics and data for our internal hiring processes. We do a good job today on external hiring for internal hires, as you say, we can do a better job to make sure we are opening reqs, interviewing diverse slates, etc. one of the action items we took from this CS show internal hiring metrics as well (% of internal movement that happens through reqs, % of reqs that had a diverse slate of candidates, etc). I haven't yet figured track the data on who makes up the interviewing team.... but we are actively ideating on it. Suggestions welcome. Come to one of the roadshow sessions and I'll share more of this early data with you.

Actions




6

Brown, Danielle M Jul 26, 2016 8:36 PM (in response to Stahlman, Erik S)

Hi Erik: Very good points you call out. We are just now starting to collect metrics and data for our internal hiring processes. We do a good job today on external hiring for internal hires, as you say, we can do a better job to make sure we are opening reqs, interviewing diverse slates, etc. one of the action items we took from this CS show internal hiring metrics as well (% of internal movement that happens through reqs, % of reqs that had a diverse slate of candidates, etc). I haven't yet figured track the data on who makes up the interviewing team.... but we are actively ideating on it. Suggestions welcome. Come to one of the roadshow sessions and I'll share more of this early data with you.

Actions




6

Brown, Danielle M Jul 26, 2016 8:44 PM (in response to Ramaseshan, Sathyaprasad S)

Hi Sathyaprasad. You are correct, we definitely do place value on standardization and "copy exactly" at Intel and I also agree, there have been many places in our culture that that approach is merited and beneficial. It's very possible that your hypothesis is true. I wish we had gone on to ask the question of those who disagreed that greater diversity drives better team results, but alas we did not. I do suspect your hypothesis may be one driver of the results. I also think in our data-driven, engineering-focused culture perhaps many will reserve their judgment until they see data that proves diversity leads to better team results. That's not bad, and we'll continue to try to gather more data on this, because I agree data is important.


Actions



6

Brown, Danielle M Jul 26, 2016 8:50 PM (in response to Perez-paz, M N)

Thanks MN!!! We are ALL Intel employees and we are ALL here for the good of Intel- I don't find the discourse critical.... I find it to be a respectful dialogue between (SUPER) smart people who are seeking to understand more!! That's cool by me :) To your points, we are not sure what is going on wrt managers and the root cause of manager demographics just yet. We are continuing to dig in. Interested in thoughts here.




6

Brown, Danielle M Jul 26, 2016 8:55 PM (in response to Henkel, Laurel)

Seconding Laurel's comment. If the data in this story (which is a small subset of the entire CSD story) piqued your interest, I'd invite you to please join us at one of our forums at your sites. I encourage discussion, debate, data critiques, ideas, and feedback (always aiming to learn more!) and ideas for how we can solve some of the challenges.

Actions




5

Wilson, Mark Jul 26, 2016 9:40 PM (in response to Turner, Stephen)

If I don't want to dance, why should I be in the target group for those who want to dance. Maybe I should attend some conferences to tell me why I should want to dance.

Actions



5

Garcia, Khalfani Jul 26, 2016 9:48 PM (in response to Chua, Fiona)

It's ok to have a personal opinion, but your opinions should be based on facts, data and research. Research shows that when an UNqualified candidate is improperly hired, that UNqualified candidate is much more likely to be MALE than female. In a study published in the Proceedings of the National Academy of Sciences, March 2 No.12, 4403-4408, Dr. Ernesto Ruben of Columbia University wrote "In all our conditions, suboptimal decisions were made in favor of the male candidate significantly more often than in favor of the female candidate" and "hiring managers possess an extraordinary level of gender bias when making decisions and filling positions, often times less qualified male over a superiorly qualified female." You can read about that study and many more like it on my Inside Blue blog here: <https://soco.intel.com/blogs/ShowMeTheData/2015/05/11/workplace-diversity-what-external-research-shows--short-version>

Actions



Sundararaman, Shyam Jul 26, 2016 10:19 PM (in response to Brown, Danielle M)

@Danielle, I am looking for data. In the meantime, yes that is my hypothesis based on experience. I think the older a person is, the more likely he/she is to liken ba "good old days" and pooh pooh current efforts. They may pooh pooh diversity initiatives similarly.

Actions

1 ... 4 5 6



Circuit News



# The road to full representation: a study on retention and progression

Posted by Vasquez, Krista in Circuit News on Jul 26, 2016 8:40:01 AM



Danielle Brown and Barbara Whye discuss a new report on URM retention and progression—and the immediate act we're taking to improve.

[Read Full Article](#)

19279 Views   Categories: Business & Strategy   Tags: diversity and inclusion, multicultural representation and progression

Average User Rating  
(0 ratings)

Your Rating:

5 HELPFUL   MOST LIKED

217 Comments

1 ... 3 4 5

- 4

Knauerhase, Robin Jul 26, 2016 3:55 PM (in response to Mirmak, Michael)

Someone from GDI can correct me if I'm wrong, but we aren't aiming at parity with the nation, but rather parity within the tech community. If population A is less lil tech, but 20% do go into tech, we're aiming at 20%, not the whole group. Now, when we get to a point that all populations/cultures/groups are equally likely to go feel free to do whatever they want), THAT will be a glorious day. Sadly, it's a bigger problem than Intel can solve, IMHO.

Actions
- 3

Koston, Joseph Jul 26, 2016 3:55 PM

Can you share more details on the slide 'URMs are experiencing intel differently'? What do the green dots and red arrows mean in the data? Were they yes/no que: numbers percentages?

Actions
- 4

Knauerhase, Robin Jul 26, 2016 3:56 PM (in response to Knauerhase, Robin)

(I intended to add "or peer companies across the nation" but forgot.)



Actions



3

Barnes, Winton A Jul 26, 2016 3:59 PM (in response to Morgan, Eric)

The beatings will continue until morale improves?

Actions



4

Knauerhase, Robin Jul 26, 2016 3:59 PM (in response to Manny, Jeff M)

Let's be careful of an insidious assumption that might be at play here. Hiring a URM does \*not\* mean hiring someone less qualified. If someone's an idiot, they shc regardless of diversity guidelines and so on. In all my time at Intel, I've never seen a lesser-qualified diverse candidate be hired. That might not be true all over, bu should be.

Actions



2

Anantharaman, Kapil Jul 26, 2016 4:01 PM

Not sure if this has already been addressed but i have always been bothered by lumping 4.5 billion asians (source: google) into one race for diversity purposes.

Actions



4

Knauerhase, Robin Jul 26, 2016 4:03 PM (in response to Pohle, Glen V)

Colleagues at other companies are often shocked that we'd talk about, let alone release, data like this. I'm proud that Intel's data-driven nature applies even in wha considered a "squishy" area like this. =)

Actions



4

Knauerhase, Robin Jul 26, 2016 4:06 PM (in response to Turner, Stephen)

I think the second sentence might be improved as "we ask them to dance, and make sure that there aren't obstacles to dance, and be certain they know our invitat sincere". Inclusion is a tricky thing to define, especially when it challenges existing practices, cultures, and prejudices. That said, if I may stereotype even in this cor many people are not interested in watching engineers dance. =)

Actions



5

Garcia, Khalfani Jul 26, 2016 4:09 PM (in response to Brown, Danielle M)

Yes, Scott, there is research in this area. Danielle already pointed you to one study and there are many more. There is a study by McKinsey and Co. (Why Diversity M January 2015) which found that: "In the United States, there is a linear relationship between racial and ethnic diversity and better financial performance: for every increase in racial and ethnic diversity on the senior-executive team, earnings before interest and taxes (EBIT) rise 0.8 percent." You can read about that study and n my Inside Blue blog here: <https://soco.intel.com/blogs/ShowMetheData/2015/05/11/workplace-diversity-what-external-research-shows--short-version>

Actions



2

Koehl, Sean M Jul 26, 2016 4:12 PM (in response to Meyers, John G)

I'd think we'd want to make these affluent suburbs more diverse at the same time.

Actions



4

Knauerhase, Robin Jul 26, 2016 4:13 PM (in response to Morgan, Eric)

"Benefits a group" is a tricky term. If we were hiring to quotas, that would be true. But hiring to the expected percentage of tech population doesn't actually benefi rather, it makes up for inequalities among the groups. That's an important difference.

Actions



1

Dhaliwal, Harsharan Jul 26, 2016 4:16 PM (in response to Pohle, Glen V)

It was definitely the case for Folsom, as someone who's lived in the Greater Sacramento Area his whole life. Folsom was largely undeveloped when Intel opened up

here, and was still pretty undeveloped for some time after. A lot of the commercial developments in Folsom, including Palladio (which now attracts a lot of people to areas to Folsom), weren't finished until pretty recently (development was halted during the recession).

Actions



4

Pawashe, Chytra Jul 26, 2016 4:20 PM (in response to Pohle, Glen V)

Hillsboro was all farm land before Intel came.

Actions



4

Pawashe, Chytra Jul 26, 2016 4:22 PM (in response to Prout, Lisa J)

Technically most of Russia is in Asia... Same with the middle east. In the end, we're all African.

Actions



2

Harris, Tom H Jul 26, 2016 4:37 PM (in response to Knauerhase, Robin)

Do you think the diversity of the Penang campus should or does resemble the diversity at the Oregon campus? Is the American Indian experience in Penang the Asian experience in Arizona? These numbers are presented at an Intel wide level, but one must have the location and local diversity to understand the frame of reference.

Actions



2

Harris, Tom H Jul 26, 2016 4:45 PM

Considering we have campus locations all around the world, it would be interesting to see the data by campus. Is the Asian experience in Penang different than in other locations as well represented in Ireland as they are in Arizona? Sure, we hire from all around the world, but the majority of hiring comes from local populations, is that reflected in the diversity vs. campus location numbers?

Actions



10

Yap, Sook Chin Jul 26, 2016 4:46 PM (in response to Anantharaman, Kapil)

Interesting that Asians as a category feel negatively on "I can be who I am without confirming to other's expectations". It is true across the gender boundary.

Actions



9

Tittsworth, Stacy Jul 26, 2016 4:50 PM

As a long time supporter of such efforts and board member of several ERG's, I have been rather disappointed in how recent diversity efforts have played out, particularly in the case of ACT. I've seen every high level technical female I know at risk, forced out through ERP or, like me...eliminated as entire departments and professions are decimated in the name of something to reflect upon. When I entered the office of the company I will join in a few weeks, the very first thing I noticed was diversity. Putting aside the respect for the profession and diversity of thought and career, I didn't even need to ask (though I did and was even more impressed) about their values around diversity -- I could have guessed. I have heard so many awful comments about women and minorities as I have in the past few months, heck one guy even went into detail about what poor workers over 40 are. Okay...well all I can say is that it will be a relief not to hear jokes about giving women black eyes or how useless training departments are or stupid non-engineers. I know how useless those of us who dared to stay alive past the age of 40 are. Perhaps in the midst of all the restructuring, we might ask why on earth an experienced, knowledgeable professional would choose such an environment over an already inclusive, respectful one and what we're doing wrong. Hint: outsourced vendor training programs are the answer and do not fix the root causes.

Actions



2

Averitt, Larry G Jul 26, 2016 4:54 PM (in response to Glazier, Spencer)

Agree - thanks for sharing. Two things build strong teams, trust and safety. Build both through adversity. It's really easy.

Actions



3

Tadepalli, Hari K Jul 26, 2016 4:54 PM (in response to Hsing, David)

As a company that produced only microprocessors for nearly 40 years, I can not imagine what it would mean to produce a microprocessor that appeals to race, gender, physique and cultural attributes. I can understand their relevance to products that need to be differentiated for fulfilling those attributes - as for example, clothing, furniture or eye wear. What would a microprocessor designed to appeal to the "asian race" or "tall people" look like? The statement also presumes that everyone values diversity.

product is engaged in its design, as opposed, say, packaging, finance, marketing or inventory management.

Actions



Koehl, Sean M Jul 26, 2016 4:56 PM (in response to St Pierre, Eric R)

@ 1



Actions



Henkel, Laurel Jul 26, 2016 5:01 PM (in response to Knauerhase, Robin)

Exactly right, Robin. We are aiming at market availability not parity with the general population.

Actions



Stahlman, Erik S Jul 26, 2016 5:08 PM

How is HR collecting the data on who makes up the interviewing team? There are teams where the interviewing group has been non-diverse - How will HR ensure interviewers are available and can override the biased decisions of the technical interviewers? While there is a fast-track program for hiring external URM's, there is for internal transfers to ensure that the req isn't filled by the undesired 'like hires like' bias.

Actions



Fuentes, Linda Jul 26, 2016 5:08 PM (in response to Brown, Danielle M)

Take a look...the slide has been updated to show the numbers, which represent the degree of difference (% less likely to agree with the statement). For example: -7 this group is 7% less likely to agree with that statement.

Actions



Morgan, Eric Jul 26, 2016 5:10 PM (in response to Knauerhase, Robin)

It's different only as a result of scale. Considering a population as a whole it's easy to justify but when it comes down to two individuals vying for the same position the strategy is quite real. How exactly do you "hire to an expected percentage" without discriminating during that hiring process? I've been trying to come up with procedure to accomplish that but it's escaped me so far. Simply ensuring that the candidate pool is diverse does not guarantee that the hiring will result in the desired percentages.

Actions

Circuit News



The road to full representation: a study on retention and progression

Posted by Vasquez, Krista in Circuit News on Jul 26, 2016 8:40:01 AM



Danielle Brown and Barbara Whye discuss a new report on URM retention and progression—and the immediate act we're taking to improve.

[Read Full Article](#)

19279 Views   Categories: Business & Strategy   Tags: diversity and inclusion, multicultural representation and progression


Average User Rating  
(0 ratings)

Your Rating:

5 HELPFUL   MOST LIKED

217 Comments


1 2 3 4

- 

2

Morgan, Eric Jul 26, 2016 2:16 PM


I find it concerning that the results are surprising. We've created an initiative that benefits a certain group of people directly. When asked, that group thinks it's a go we ask those it doesn't benefit directly, they are less enthusiastic. This shouldn't be surprising. What I do find surprising is that we've identified a group that feels di the narrative (slide 2) and our response is simply to "engage" them until they agree.

Actions
- 

3

St Pierre, Eric R Jul 26, 2016 2:21 PM (in response to Henkel, Laurel)

If you start with the view point that "like likes like" and that the problem is an inherent bias to prefer hiring your own race and gender, then your solution will simply an alternate bias to get the arbitrarily determined proportions of arbitrarily selected categories. It is ironic that you can not see the this logic simply ends with mor sexism.

Actions
- 

3

St Pierre, Eric R Jul 26, 2016 2:22 PM (in response to Henkel, Laurel)

aadf

Actions



Pjescic, Ilija Jul 26, 2016 2:25 PM (in response to Glazier, Spencer)

Awesome read...appreciate the post :)

Actions



Garcia, Khalfani Jul 26, 2016 2:25 PM (in response to Seelig, Scott M)

Scott, there is lots of research showing that increased diversity leads to better company performance. For example, one study by McKinsey and Co. (Is There a Pay Gap? Team Diversity: Thomas Barta, Marcus Kleiner, Tilo Neumann, April 2012) found that at more diverse companies: "...ROEs were 53 percent higher, on average, than those in the bottom quartile. At the same time, EBIT margins at the most diverse companies were 14 percent higher, on average, than those of the least diverse companies." You can read about that study and many more on my Inside Blue blog here: <https://soco.intel.com/blogs/ShowMetheData/2015/05/11/workplace-diversity-what-ex-research-shows--short-version>

Actions



St Pierre, Eric R Jul 26, 2016 2:37 PM

If you start with the view point that "like likes like" and that the problem is an inherent bias to prefer hiring your own race and gender, then your solution will simply be an alternate bias to get the arbitrarily determined proportions of arbitrarily selected categories. It is ironic that you can not see the this logic simply ends with more sexism.

Actions



Keller, Karlin Jul 26, 2016 2:37 PM (in response to Schrater, Jesse)

Hi Jesse, On your last comment about leadership representation and a smaller portion of URM's with the stem background required for those roles. That's the four what we define as representation. Full representation does not mean that our leadership reflects the US demographic breakdown but instead is based on the market of talent at different levels. You'd correct and our goals reflect that reality.

Actions



Bennett, William A Jul 26, 2016 2:38 PM

Is Intel realizing any financial gains with their diversity program? We are so revenue focused at Intel. Are they meeting any government goals?

Actions



Gonzales, Eric2 A Jul 26, 2016 2:42 PM

It would be nice to see a table which breaks out, by percentage, the age or time in service of each URM (not just grade). I think with this information, one could make judgement on how to fix the issue described in the table, "URMs are experiencing Intel's environment differently".

Actions



Harker, Eric B Jul 26, 2016 2:42 PM (in response to Brown, Danielle M)

I think, realistically, everyone is the problem. All people of all race and gender have inherent biases and prejudices. Simple reality. If you didn't, you wouldn't be a being!. But when you are the majority, those biases, even at a sub-conscious level, have more impact. Maybe that's a fairer way to frame it? Just a suggestion!

Actions



Brown, Danielle M Jul 26, 2016 2:50 PM (in response to Teshera, Tony)

Stephen, Tony: Understand your point and thank you for your feedback. @Stephen: We don't have historicals for this data set, so used this survey of 15K employees as a baseline. I'm hoping we can measure improvement to the baseline going forward, because that will definitely help us accurately assess and improve. You are also correct that the chart is not as clear as it could be; we oversimplified the chart for Circuit vs. what we presented to MCM (I'm seeing if we can get it updated!). We had the numerical difference for each red arrow on the chart originally, showing the margin of difference for each response. Agree that's obviously a much more robust look.

Actions



6

Brown, Danielle M Jul 26, 2016 2:52 PM (in response to Smith, Stephen1 A)

Stephen, see my response below under Tony's comment. You make some good points.... and I have some additional explanation that may help..... Also encourage any others who want to talk more about data to join one of our open forums coming up, and ask more! I do love talking data and thinking these issues through with driven people!!

Actions



10

Hsing, David Jul 26, 2016 2:54 PM (in response to Henkel, Laurel)

I'm not aware of any Asian-male targeted tech

Where are they so I can buy them

Actions



5

Garcia, Khalfani Jul 26, 2016 2:59 PM (in response to Schrater, Jesse)

Hi Jesse, You mention "...rising through the ranks," or internal promotion, but that is only a portion of where our manager population comes from. Like any other companies, managers are also hired from outside the company. We hire IC's (of all races and genders) from outside and we also hire Managers (of all races and genders) from outside. I also mention skillset, and as I describe in my reply to Dmitri, our Market Availability numbers and our manager representation goals are indeed based on the availability at different levels and in different organizations and so are appropriate to the specific org and level. As an example, Intel's Technical African American Market Availability grade 10+ level is 2.0%, which is significantly lower than the Technical Market Availability at other levels because African American talent at that grade 10+ level is scarce. In other words, our numbers and goals already take into account the issues you describe.

Actions



1

Clarke, Jolyon M Jul 26, 2016 3:02 PM (in response to Brown, Danielle M)

We are inherently one people, infinitely varied with unique talents and capacities, independent of race or gender. For an organization to maximize its capacity it should want to draw upon the best it can. It does not make sense that brilliance is centered in one group. Hence, if our numbers do not match the greater society, our thinking of capacity as a company may be incomplete. Our country also has a deep history of racial attitudes and division which affects us all in some way. We are not separate environments and are influenced by it in some way, as we in turn try to improve ourselves and influence the environment. Working to ensure that all groups are represented seems like a wise strategy under the circumstances.

Actions



5

Manny, Jeff M Jul 26, 2016 3:15 PM (in response to Athavale, Atul S)

That's a good, sound, engineering-minded response, Atul :) I would add that "diverse viewpoints", are not necessarily guaranteed by diverse physical characteristics. Initiative seems to be focusing on. It could do so, but it's not guaranteed. I've yet to see any independent, conclusive data/study (meaning, not funded by the government often grants research funds only to researchers that agree with its premise) based on scientific methodology proving it to be the case. But I do like the idea of the 'approach' you mention of educating people to not let 'artificial barriers' get in the way of achieving workforce diversity in a natural way -- I would add putting a barrier in place where bias violations could be reported. I think most of us who have been in engineering awhile have trained our minds to eliminate such biases for the next are always looking for the 'best' (w/respect to time, efficiency, viability, etc) solution to problems we need to solve.

Actions



3

St Pierre, Eric R Jul 26, 2016 3:16 PM (in response to Tillman, Daniel)

I do not believe I am inherently biased. I do not believe you are inherently biased.

Actions



2

Huang, Yikai Jul 26, 2016 3:18 PM (in response to St Pierre, Eric R)

I agree. Article first mentions we want to leverage "like likes like", which means we are encouraging this behavior. But then in later paragraph, they state that the hiring promotion are not based on skin color or race. To me these two statements logically contradict each other.

Actions



3

Fernow Jr, Jonathan M Jul 26, 2016 3:26 PM



I had some observations looking at this data. Looking at "Efforts to reach realistic..." and being data driven is .4 and .9 statistically significant? If so are Asian women less as their female peers in accepting of diversity than White, African American, and Hispanic women. Also for management, VP, and Fellows who I assume most have Intel 10-30 years. I would assume would correlate to affluent Oregon and California neighborhoods from that time period (1990 3.7% "black" 17% Asian). I would pool to represent the populations in the major cities we hire in at the time of the beginning of a NCG who is a future VP or fellow climbing the ladder. We are representing the city and population for that time. For an exaggerated example for a point the eskimo population is probably underrepresented in our Texas sites, but we agree by Texans having an internal bias to the eskimo population. <http://www.bayareacensus.ca.gov/counties/SantaClaraCounty70.htm> . "URMs experience Intel's environment differently" is really sad to me if this is truly new employees experience Intel and should be the root issue being addressed. However it would be interesting to divide year at Intel employees so that it is not all the new URM we hired are not feeling heard in the group because they are new (a 10 year veteran from New York/Boston report feeling different from an intern in the same situation).

Actions



2

Smith, Stephen A Jul 26, 2016 3:34 PM (in response to Brown, Danielle M)

Saw the update. Thanks, Danielle

Actions



5

Garcia, Khalfani Jul 26, 2016 3:44 PM (in response to Mirmak, Michael)

Interestingly, similar arguments have been made about women and their supposed "lack of desire" to reach management or pursue STEM careers. I think people will find ways to explain data that they don't like. But still, the data speaks. Check out this article: [Study Finds Executive Women Are Just As Ambitious As Men](#)

inside Blue

Home

Activity

Browse ▾

Explore ▾

Apps ▾

@ 1



Actions



6

Brown, Danielle M Jul 26, 2016 3:50 PM (in response to Sundararaman, Shyam)

Hi Shyam and Ray: I don't think that our respondents identified by age, so I'm not sure we have this data. Is your hypothesis that age makes a difference in perceiving diversity positively or negatively? Any data you have on this?

Actions



4

Knauerhase, Robin Jul 26, 2016 3:50 PM (in response to Harris, Tom H)

I am not on the team so don't have a concrete answer. But many groups at Intel hire from universities across the nation. So "looking like" Oregon or Rio Rancho or likely not to be a desirable goal regardless of whatever those places look like.

Actions



5

Garcia, Khalfani Jul 26, 2016 3:51 PM (in response to Panning, Benjamin J)

Benjamin, there is lots of research showing that increased diversity leads to better company performance and better team performance. For example, one study (E and Creativity in Small Groups: P.L. McLeod, S.A. Lobel, T.H. Cox Jr., Small Group Research, May 1996, vol. 27: 248-264.) found that: "The ideas produced by the ethnically diverse groups were judged to be of higher quality--more effective and feasible-- than the ideas produced by the homogeneous groups." You can read about that study and on my Inside Blue blog here: <https://soco.intel.com/blogs/ShowMetheData/2015/05/11/workplace-diversity-what-external-research-shows--short-version>

Actions



4

Knauerhase, Robin Jul 26, 2016 3:52 PM (in response to St Pierre, Eric R)

I understand that you don't believe that. And you might even be right. But LOTS of people believe they aren't biased and yet the numbers work out that they are and they believe it.

Actions

1 2 3 4

Circuit News



# The road to full representation: a study on retention and progression

Posted by Vasquez, Krista in Circuit News on Jul 26, 2016 8:40:01 AM



Danielle Brown and Barbara Whye discuss a new report on URM retention and progression—and the immediate act we're taking to improve.

[Read Full Article](#)

19279 Views   Categories: Business & Strategy   Tags: diversity and inclusion, multicultural representation and progression

Average User Rating  
(0 ratings)

Your Rating:

5 HELPFUL   MOST LIKED

217 Comments

1 2 3

- 1

Bapat, Ameya Jul 26, 2016 12:19 PM

Good data and presentation. Thank you for sharing. Asian as usual is a very broad term.

Actions
- 2

Schrater, Jesse Jul 26, 2016 12:27 PM

I am proud of Intel's boldness in tackling this challenge, and I agree that the goal is worthwhile. However, we need to be careful that we don't let partial data divert wrong course. It would be unfortunate if we allowed flawed statistics to lead us to declare that our strategy is not working, and then take on increasingly draconian that could create a perception backlash against these otherwise-admirable objectives. Case in point is the statement that "When a population of employees make percent of the population, you would expect them to make up that same percent of the manager population." This leaves out some important factors. One is time a big campaign to recruit more URM 5 years ago, but the average manager has 10 years of experience, then you'd expect there would be a bubble at the lower end that would take time to rise through the ranks. Another factor is skillset. If a significant majority of senior leaders have STEM backgrounds due to the focus of our a smaller percentage of URM have those backgrounds, then you'd expect that the percentage of URM in those senior positions would be reduced. These are not discriminatory, they are reflective. I hope we'll be careful to not throw the baby out with the bathwater.

Actions



5

Garcia, Khalfani Jul 26, 2016 12:41 PM (in response to Prout, Lisa J)

All Intel employees self-select their gender and their racial category, so yes, people self-identified.

Actions



4

Rodriguez, Eric Jul 26, 2016 12:42 PM (in response to Neschleba, Patrick)

Hi Patrick, I appreciate your comment. As a role model for diversity, continue to do what you do. 6 years ago when I joined Intel, a manager just like yourself, create environment for his employees to succeed. I can assure you that the employees you work with see your advocacy. I would not be at Intel today if it was not for my manager supporting, sponsoring and enabling me to bring my full self to Intel.

Actions



5

Sundaraman, Shyam Jul 26, 2016 12:49 PM

Love the transparency here Danielle and Barbara. Thanks! One open: Do you have any breakdown of how the perception of "diversity results in better outcomes" vs think age is as much a factor here as the race of a person in how he/she perceives diversity. Thanks, Shyam

Actions



7

Brooks, Adam J Jul 26, 2016 12:59 PM (in response to Brown, Danielle M)

Danielle - The executive summary admits that the study only found correlations and was not able to attribute causation at all. Which means that while it may warrant study, the study itself does not prove any beneficial benefits of a more diverse work force. It is also incredibly vague on exactly what analysis went into making each. Would it be possible to get the raw data and equations posted internally?

Actions



3

Hassell, Rexel Liz Jul 26, 2016 1:06 PM (in response to Prout, Lisa J)

I didn't know that there is a difference in how American and British English use the word Asian. I would think that, by geography, it would be universal to imply that someone who is a native of the Asian continent or whose parents are from the Asian continent (North, South, East, West Asia, including the little islands off of the continent that is still geographically defined to be a part of Asia)

Actions



5

Godin, Leo G Jul 26, 2016 1:16 PM

It seems like we are up against a fundamental math problem. Over time, unbiased hiring and promotion should lead us to parity. However, if we want to hit parity today, we need preferential hiring and promotion? We need to hire and promote above parity to reach our goal. Why can't we simply say something like, "Next year, we will have X number of women," then go out and find X number of the most talented women we can find? I am confident that there are plenty of talented women who will be great employees. We can do the same thing for promotions. I assume this same approach would work for any URM group. If someone like me is skipped for a promotion, suck for me, but so be it. If reaching parity is the right thing to do, we should fully commit to it, and be proud about what we are doing.

Actions



5

Garcia, Khalfani Jul 26, 2016 1:18 PM (in response to Nikonov, Dmitri E)

Dmitri, you are conflating a slide/statement about Manager Representation, with a slide/statement about VP & Fellow representation. There are two separate areas looked at separately. Note, for example, that not all VP's/Fellows are managers. And, of course, not all managers are VP's/Fellows. We have grade 3 Managers at Intel. I think you are getting at the issue of Market Availability which is explained in this video: [http://employeecontent.intel.com/content/news/nonportal/manager-leadership-connection/fullinclusion\\_7142015.html](http://employeecontent.intel.com/content/news/nonportal/manager-leadership-connection/fullinclusion_7142015.html) and also in the Appendix (pg 51) of our Diversity Annual Report which is here: <http://www.intel.com/content/dam/www/public/us/en/documents/corporate-information/diversity-annual-report-2015-final.pdf> Our Market Availability numbers for manager representation goals are indeed based on the availability of talent at different levels and in different organizations and so are appropriate to the specific context. As an example, Intel's Technical African American Market Availability at the grade 10+ level is 2.0%, which is significantly lower than the Technical Market Availability because African American talent at that grade 10+ level is simply less available.

Actions



4

Liddick, Matthew M Jul 26, 2016 1:22 PM (in response to Fuentes, Linda)

I think I know where this stems from, at one of the BUMs a senior person came out and said that if any position, I believe grade 7 or higher, wasn't going to be given

then she needed an explanation why and sign off on it. While it is true that is not the same as saying you must hire URMs, there is a clear undertone that if you don't to explain yourself in front of a VP then hire only URMs. If that isn't a set up for unconscious bias I don't know what is.

Actions



2

Meyers, John G Jul 26, 2016 1:25 PM

Intel puts campuses almost exclusively in affluent suburbs and then is surprised that its workforces doesn't match the diversity of the general population. Lets put towards locating a campus in downtown Oakland, south Sacramento or East LA where our target workforce actually lives.

Actions



3

St Pierre, Eric R Jul 26, 2016 1:28 PM (in response to Brown, Danielle M)

I disagree with dividing people by race and gender. This is inherently divisive and can only create more divisiveness. I can not be part of this work because I do not categorizing people by their race and gender. Inclusion and diversity sow the seeds of their failure because their first step is to divide people into categories. You cannot have inclusion when your first step is division. Want to try a radical solution? Stop dividing based on race and gender. But you can't do that, because the government first divide people into groups and report out your progress against their arbitrary goals.

Actions



2

Anderson, Ray Jul 26, 2016 1:36 PM (in response to Sundararaman, Shyam)

Good point! Very curious about this answer as a younger member of Gen Y (millennial ).

Actions



1

Miller, Donavon Z Jul 26, 2016 1:36 PM

I believe there may be skepticism in how the diversity initiatives are being implemented due to concerns regarding meritocracy. If Intel leadership could better communicate that is not being compromised I think it would go a long way to gaining the support of the Caucasian and Asian males that you say you are trying to recruit.

Actions



7

Pohle, Glen V Jul 26, 2016 1:48 PM (in response to Meyers, John G)

Actually, I think the affluent neighborhoods grew up around Intel vs. the other way around. At least, that's the case in Chandler and I believe was the case for Rio Rancho and Folsom. Maybe even Hillsboro too.

Actions



5

Vargas, Patricia Jul 26, 2016 1:48 PM

when can we expect to have this open sessions in LAR?

Actions



4

Glazier, Spencer Jul 26, 2016 1:49 PM

I'm just going to leave this here in hope that people take the time to read it. <http://www.nytimes.com/2016/02/28/magazine/what-google-learned-from-its-quest-for-a-perfect-team.html>

Actions




3

Teshera, Tony Jul 26, 2016 1:54 PM (in response to Whye, Barbara H)

Barbara, in all fairness that's not a great response to the question raised. These are serious issues that deserve everyone's attention and action across the company. The representation of the data must be as credible as possible. To anyone familiar with statistics, data analysis/visualization and similar fields, this is a clear case of using bad data to make the point. That erodes credibility and distracts from the real issues we face here. Please take this as constructive feedback that we should strive to report data with as much transparency and intellectual honesty as possible. Anything less undermines the case you're trying to make.

Actions




1

Tillman, Daniel Jul 26, 2016 2:00 PM (in response to St Pierre, Eric R)

What is inherently divisive is our bias. What is inherently inclusive is diversity. When diversity and inclusiveness is not happening, it is our duty to do something a

Actions




4

Lemere, Michael J Jul 26, 2016 2:05 PM (in response to Glazier, Spencer)

This was a good read, long, but worth while. Thanks for sharing....

Actions



2


Ramaseshan, Sathyaprasad S Jul 26, 2016 2:05 PM (in response to Brown, Danielle M)

Hi Danielle. I have a different hypothesis for the views of the White/Asian managers. For the last 2-3 years, there has been a great focus on convergence and standi among the various orgs at Intel. In this current environment, the goal is to do things across orgs/intel the same way and not "reinvent the wheel" to promote efficien


Actions

inside Blue

HomeActivityBrowse▼Explore▼Apps▼

@ 1

Actions




7

Henkel, Laurel Jul 26, 2016 2:07 PM (in response to St Pierre, Eric R)

I truly hope we can get to that point. Unfortunately, human nature is to categorize. The data does show that "like likes like." It is simply that we draw to folks that i ourselves. If we aren't transparent with the data and honest with ourselves, this will continue to happen organically and it can create an advantage/disadvantage ei owing to numbers. If you are one of only a few amongst a larger majority population, your every day experience is very different than that of those around you. So is o.k. and sometimes it has a negative impact. Please be sure to join the open forums. We need all perspectives on the table to build an inclusive culture in which thrive.

Actions




7

Henkel, Laurel Jul 26, 2016 2:10 PM (in response to Ramaseshan, Sathyaprasad S)

Very interesting! What a great question and very worth exploring.

Actions




5

Manny, Jeff M Jul 26, 2016 2:13 PM (in response to Fuentes, Linda)

Linda -- there are clear hiring guidelines to managers to hire URM's at higher % rates for RCG, Intern, and high grade level positions. I'll leave it to you and other re: determine if this is 'discrimination' or 'special treatment'. To most I think it is pretty clear.

Actions



10

Yap, Sook Chin Jul 26, 2016 2:13 PM (in response to Hale, Alex)

To be fair, the picture is of the two ladies who are presenting the data.

Actions

## Circuit News



## The road to full representation: a study on retention and progression

Posted by Vasquez, Krista in Circuit News on Jul 26, 2016 8:40:01 AM



**Danielle Brown and Barbara Whye** discuss a new report on URM retention and progression—and the immediate action we're taking to improve.

[Read Full Article](#)

19279 Views

Categories: **Business & Strategy**

Tags: diversity and inclusion, multicultural representation and progression

Average User Rating  
(0 ratings)

Your Rating:

5 HELPFUL MOST LIKED

217 Comments

inside Blue

Home

Activity

Browse ▾

Explore ▾

Apps ▾

@ 1



3

Hey Michael, This is an interesting comment. I need to look into the data from this study but when studied women's progress in 2013 we found that women also were represented in management. We surveyed and found that an overwhelming majority did want to progress to the next grade level and become not only managers, Intel. The data was equivalent and in some grades even more women than men wanted to progress. Of course, progression is an individual decision, but in aggregate supported the assertion that manager representation should be equivalent.

1 person followed

Actions

3

St Pierre, Eric R Jul 26, 2016 11:07 AM

What a surprise. Another diversity report showing that white and asian males are the problem.

Actions

6


Brown, Danielle M Jul 26, 2016 11:09 AM (in response to Seelig, Scott M)

Hi Scott: We've done a very comprehensive study, in partnership with the Dalberg Institute, and have published it externally. this report attempts to best quantify



increased diversity on the tech industry. Here's the link to download and read: [http://www.dalberg.com/wp-content/uploads/2016/06/Diversity\\_report\\_6.20.16x](http://www.dalberg.com/wp-content/uploads/2016/06/Diversity_report_6.20.16x).

Actions




6

Brown, Danielle M Jul 26, 2016 11:10 AM (in response to Panning, Benjamin J)

hi Benjamin: See my response to Scott below showing some of the work we've done to quantify the impact of diversity in the tech industry. That said, the next pie think we need to do (and what I'd like to figure out) is how to quantify the impact to specific teams. Right now we have some good anecdotal stories, but what wou more powerful is some good quantitative data. Any ideas?

Actions




6

Taylor, Richard HR Jul 26, 2016 11:11 AM (in response to Hamel, Lee M)

I agree it's natural for people from different backgrounds to experience things differently. However, we are talking about the workplace and fundamentals of our cu meritocracy and career development, . The results of how diverse employees experience our culture/company are far beyond what we'd normally expect to see. W disparity of difference , it's important that we look more closely at contributing factors and address them as appropriate.

Actions




6

Atwal, Parveen K Jul 26, 2016 11:12 AM

Great resource to help employees understand how they fit in to the inclusion efforts at Intel!

Actions




2

Smith, Stephen1 A Jul 26, 2016 11:12 AM (in response to Chandler, Kelly)

To follow on, while the numerous charts were great in terms of presentation, they seemed to obscure or spin the data to support a predetermined conclusion, rath illustrate the facts. Another example is the "URMs are experiencing Intel's environment differently" chart. The chart lumped anything over 50% into "green" and ui "red" categories--so the disparity may have been just a few percent, for all we know ... Also a historical perspective would have been nice; only with a knowledge of trend/recent progress can we accurately assess whether to be concerned and change course, or give time for the diversification process to complete.

Actions



10

Yap, Sook Chin Jul 26, 2016 11:13 AM (in response to Brown, Danielle M)

One of the report blurbs says: "White and Asian males have a computer culture that embraces them: video games, science fiction, and so on." I'm not sure how does the computer culture embrace Asian males?

Actions


inside Blue

HomeActivityBrowseExploreApps

@ 1

everything we do. Our data, based on a survey of men and women across all ethnicities, simply showed they were less likely to agree that diversity leads to better outcomes. Doesn't mean they are a problem.... doesn't mean they are bad. Simply that they are less likely to agree with the statement. It follows, to me, that witho meaningful ways to engage our majority male peers, we will miss a huge opportunity to create an inclusive team culture. It's simply a data point. I welcome and er participation of white and asian males in this effort. We need - and want- you to be part of this work.

Actions




4

Godfrey, Loren Jul 26, 2016 11:27 AM (in response to Li, Rachel B)

I second that motion.

Actions



2

Nikonov, Dmitri E Jul 26, 2016 11:35 AM

"When a population of employees make up a certain percent of the population, you would expect them to make up that same percent of the manager population." statistically valid argument. There are many other factors which are not the same. It takes education, track record of accomplishments, and plainly time to achieve : VP or Fellow. Is the statistics of the groups corrected for percentage of advanced degrees in STEM fields? for number of IRA or DRA? for the length of employment

the industry overall? and many other factors ...

Actions



Prout, Lisa J Jul 26, 2016 11:40 AM

I'm curious how Asian is defined in this study. Did people self identify? American English usage of the word means East Asian, while British English means anyone on the continent of Asia, and I find that to accurate in discussions w/ my (Indian) friends. [http://www.oxforddictionaries.com/us/definition/american\\_english/asian](http://www.oxforddictionaries.com/us/definition/american_english/asian)

Actions



Barber, Benjamin Jul 26, 2016 11:40 AM (in response to Henkel, Laurel)

You're not talking about equality of opportunities, you're talking about equality of outcomes and conflating the two, by using the words "at a lower rate".

It's likely that I'm more well versed in this topic than you're aware of, but that no amount of facts are going to change your opinion that is based on emotion.

google "suspect class"

Actions



Henkel, Laurel Jul 26, 2016 11:42 AM (in response to Neschleba, Patrick)

Relative to being screened out for a job...this is why the action steps that have been approved are designed to increase the diversity of the pool of candidates and the perspectives of the interview panel. By increasing the diversity of the pool (opening a req for more employees to apply and requiring a diverse candidate slate) and the panel, we mitigate for potential unconscious bias without driving a specific outcome. It is simply meant to level the playing field to ensure we really get the best candidate for the job. I predict that having a req for more jobs will actually benefit everyone. We have way too many instances where folks get jobs just because they are known to the manager...many times a better candidate exists.

Actions



Henkel, Laurel Jul 26, 2016 11:48 AM (in response to Yap, Sook Chin)

Stereotypes indicate that these folks are more likely to be good at these hobbies and be heavily engaged in them. Stereotypes of other cultures do not indicate that Asian males are more highly represented amongst folks engaged in or working in tech than they are in the general population. This contributes to the stereotypes and the fact that tech is built with them in mind.

Actions



Henkel, Laurel Jul 26, 2016 11:55 AM (in response to Barber, Benjamin)

I was merely pointing out that the root cause of the data is bigger than hiring.

Actions



Henkel, Laurel Jul 26, 2016 11:55 AM (in response to Barber, Benjamin)

I was merely pointing out that the root cause of the data is bigger than hiring.

Actions



Whye, Barbara H Jul 26, 2016 11:56 AM (in response to Smith, Stephen1 A)

The research methodology on this CSD was quite comprehensive. It consisted of 7K+ survey participants including URMs and non URMs as well as interviews with 450 employees as well as a look at our performance and management systems and practices. the data reflects employee responses and their facts as shared by their experience.

Actions



Whye, Barbara H Jul 26, 2016 11:58 AM (in response to Atwal, Parveen K)

It has certainly provided me great insight and ways I can be better as a leader in this company. Awareness and data are always key steps toward forward progress.

Actions



Whye, Barbara H Jul 26, 2016 12:00 PM (in response to St Pierre, Eric R)

Most often as in engineering problems, there are many root causes including systems, practices and structures. i certainly didn't walk away from the study with the you cited above. I walked away more optimistic that we have data that highlights challenges and as we always do in Intel, we try and get better and solve broken s

Actions



Whye, Barbara H Jul 26, 2016 12:04 PM (in response to Pohle, Glen V)

Agreed. We believe data is key for creating evidence based recommendation. We can effect change here and it will require all of us and thanks for your support.

Actions



Nikonov, Dmitri E Jul 26, 2016 12:07 PM (in response to Brown, Danielle M)

Danielle, I read the report and still do not understand how this conclusion is treated as self-evident truth. The centerpiece of the report is that there is a correlation degree of diversity and the revenue of a company. A common statistical principle is "correlation does not mean casuation". E.g. URM tend to work for companies wi revenue, if you switch this workforce to another company, it may not affect its revenue. Besides, the effect on earnings is 10 times weaker. Is revenue a good meas performance or of making a final product instead of components?

Actions



Garcia, Khalfani Jul 26, 2016 12:08 PM (in response to Seelig, Scott M)

Scott, there is lots of research showing that increased diversity leads to better company performance. For example, one study by McKinsey and Co. (Is There a Payc Team Diversity: Thomas Barta, Marcus Kleiner, Tilo Neumann, April 2012) found that at more diverse companies: "...ROEs were 53 percent higher, on average, than those in the bottom quartile. At the same time, EBIT margins at the most diverse companies were 14 percent higher, on average, than those of the least diverse cor can read about that study and many more on my Inside Blue blog here: <https://soco.intel.com/blogs/ShowMetheData/2015/05/11/workplace-diversity-what-ex-research-shows--short-version>

Actions



Whye, Barbara H Jul 26, 2016 12:08 PM (in response to Athavale, Atul S)

I agree that if we are to achieve sustainable inclusion across the corporation, but will require each of us to be cognizant of our "cruise controls" and our own biases how they show up in our decision, practices and interactions. Frankly, we all have them. We also need to do a better job of recognizing leaders who are embracing want to do this work well.

Actions



Henkel, Laurel Jul 26, 2016 12:15 PM

In the sidebar of this article, there is an invite to open forums at various sites. These are a great opportunity to engage in this dialogue. Articles and commentary t on emotions without the full benefit of face to face communication. Voice inflection, facial expression and body language matter when interpreting the intent of a to face also allows for us to express our thoughts and ask questions in a more productive/resolution oriented way. If you are at one of these sites, please be on the the email invite and try to attend. They are scheduled to allow folks to ask the questions that are weighing on them, to express their concerns and to get clarity ab

Actions

1 2

## Circuit News



## The road to full representation: a study on retention and progression

Posted by Vasquez, Krista in Circuit News on Jul 26, 2016 8:40:01 AM



**Danielle Brown and Barbara Whye** discuss a new report on URM retention and progression—and the immediate action we're taking to improve.

[Read Full Article](#)

19279 Views

Categories: **Business & Strategy**

Tags: diversity and inclusion, multicultural representation and progression

Average User Rating

(0 ratings)

Your Rating:

5 HELPFUL MOST LIKED

217 Comments

1



3

Turner, Stephen Jul 26, 2016 9:00 AM

Practicing Diversity means we invite people to the dance. Practicing Inclusion means we ask them to dance. Focus needs to be on creating that inclusive environment.

1 person found this helpful

Actions



3

Nintzel, Doug Jul 26, 2016 9:21 AM

This work that Barbara and Danielle are doing are good steps in the right direction for opening doors wider. I'm very happy to see Intel is taking action in this area and continue moving in this directions. Keep up the good work!

Actions




1

Shah, Prital B Jul 26, 2016 9:23 AM

Very proud to work at Intel , where the top leaders are open to share as well committed via actions to make a change.

Actions




4

Athavale, Atul S Jul 26, 2016 9:25 AM

"Like likes like" is very close to nepotism.I think human nature makes it very hard to do this while maintaining meritocracy. If data shows this behavior at Intel, we n alarmed. This needs to be discouraged rather than leveraged this to achieve our inclusion goals. I am an Asian male and I do think diverse veiw-points lead to bet Our entire methodology of design quality is based on this. In terms of different experiences, this may depend on individual expectations and self-confidence whi be diverse. Intel culture of constructive confrontation may often be misunderstood and contribute to this. My view in general is to have each individual employee the lack of diversity and actively ensure that he/she does not put artificial barriers to perpetuate it. I think this will lead to sustainable inclusion even though it may also agree that role models of leadership go a long way in influencing peoples career plans, but leadership requirements are related to the capability to address our disadvantages relative to our competition rather than fixing our internal problems. In any case, thanks for the work in this area.

Actions




7

Pohle, Glen V Jul 26, 2016 9:29 AM

Thank you for sharing this data. It is eye-opening but hopefully will lead to positive changes.

Actions




1

Malshe, Priyadarshini Jul 26, 2016 9:34 AM (in response to Turner, Stephen)

Roadmap is not defined for bad dancers though. They continue to dance and nobody wants to see that :-)

Actions




2

Chandler, Kelly Jul 26, 2016 9:35 AM

Interesting data, thank you for sharing. The bar chart supporting the quote "White and Asian male managers were significantly less likely to agree" that diversity le team outcomes is a bit misleading because the scale doesn't start from 0 as it should. It lends the appearance the delta female to male is 30-50% when it is proba the lines of 7-11%. Still an important piece of data to note. Can you comment on what the scale for "level of agreement" was (i.e. 1-10, 0-100%, etc.)? Thanks!

Actions




3

Hotran, Lisa M Jul 26, 2016 9:45 AM

This is extremely powerful data. Thank you Danielle and Barbara for sharing the findings with everyone! Knowledge is power, and now that we all have the same in all have to step up to be more inclusive and welcome diverse viewpoints and experiences.

Actions




2

Barber, Benjamin Jul 26, 2016 9:46 AM

Textbook definition of racisim "a person who believes that a particular race is superior to another." Please tell me how a transistor or a line of code cares produced the race or gender of the person who produced it. If you really want to stop racism or sexism, then strip away the names from the resume's, and conduct online tec interviews.

1 person fo

Actions




5

Hamel, Lee M Jul 26, 2016 9:47 AM

Is anyone considering that different people are going to have different experiences because of who they are, who they interact with, the work they do, etc etc etc? everyone to have the same experience is impossible and robotic. Humans have differences in many ways, and that's a good and normal thing.

Actions



4

Hyvonen, Sami Jul 26, 2016 9:48 AM

I've heard rumors that (pre-ACT) hiring guidelines stated that for each non-URM candidate hired, a URM candidate must also be hired. Is this true?

Actions



Liddick, Matthew M Jul 26, 2016 9:51 AM

4

The biggest gate to real diversity at Intel in my opinion is the harsh performance based culture. More than skin tone or gender your success seems to be tied to how personality is. I know of a fact my wife who is a brilliant person wouldn't last here because of all the aggressive attitudes. The pressure to work long hours with little recognition likely hurts our numbers more than real discrimination. Technical women and minorities are in demand in the market place right now, if they can get a somewhere else with a better environment why wouldn't they take it? We live in a world where sites like Glass Door let prospective employees see in and people in grass is really greener on the other side. I think work environment and morale in general is a topic that will have to be dealt with at some point if we really want a diverse workforce.

Actions



6

Hale, Alex Jul 26, 2016 10:14 AM

The first picture needs 2 males to be statistically balanced. Can't trust anything when even the diversity team lets such gender microaggressions slip through!

Actions



3

Fuentes, Linda Jul 26, 2016 10:18 AM (in response to Hyvonen, Sami)

No, Intel does not engage in discrimination or special treatment for any employee group and discrimination of any type is a violation of Intel's guidelines. Job reqs identify the skills required to perform the specific job. Gender and ethnicity are not "skills" required to perform a job. Managers may not "earmark" certain position URMs, and should not be instructed that they must hire a woman or URM for a particular open requisition.

Actions



4

Li, Rachel B Jul 26, 2016 10:26 AM

Great data! I wonder if there is some data breakdown per business groups. Thanks.

Actions



2

Harris, Tom H Jul 26, 2016 10:33 AM

Out of curiosity, do the individual Intel campus diversity numbers currently match the graduation and population diversity numbers of the local areas in which they largely hire from?

Actions



1

Guy, Kristen L Jul 26, 2016 10:38 AM

Thank you, a great article and very energizing. I'm glad that you've teased out the manager parity topic wrt like-hires-like.

Actions



8

Wilson, Stephanie L Jul 26, 2016 10:39 AM

Thank you for your efforts to make Intel an even greater place to work.

Actions



7

Mirmak, Michael Jul 26, 2016 10:39 AM

Interesting data. We unfortunately may be missing something key by assuming that, "[w]hen a population of employees make up a certain percent of the population expect them to make up that same percent of the manager population." Individual choices may not align with population statistics, but this may also miss significant in national and regional cultures within our employee base. Not every person, and not every culture, may value a management vs a technical or other career path to the same degree. Given this, will we be polling our hires and current population to see how many actually desire a management position? This may reveal where we can offer opportunities.

Actions



1

Auer, Bob Jul 26, 2016 10:45 AM

Great article and Q&A. Love the emphasis on diverse hiring pools combined with diverse interview panels. Really appreciate the context and data transparency



Actions



Seelig, Scott M Jul 26, 2016 10:47 AM

Has anyone correlated company performance to diversity objectives? Depicting the business impact will really drive a strong message.

Actions

inside Blue

Home

Activity

Browse ▾

Explore ▾

Apps ▾

@ 1



That would be a good start...we would have to use that process for internal and external hiring. Unfortunately, it would only get us so far. We still have an environn diverse employees are getting the development opportunities that prepares them to do well in those interviews at a lower rate than would be expected and that is something that can be addressed using this strategy.

Actions



Henkel, Laurel Jul 26, 2016 10:49 AM (in response to Hamel, Lee M)

The critical piece is that those different experiences are hampering progression and retention not that we all have to have the same experiences.

Actions



Panning, Benjamin J Jul 26, 2016 10:52 AM

Thank you for providing this data - it's good to see that this effort is being driven and tracked by data. There are two additional data points that I think would help your point for race-based and gender-based hiring/advancement. First, can you provide data that demonstrates diversity improving team performance? This effort be based upon the supposition that increasing URM representation will improve Intel's effectiveness, but the only data I see related to this is the survey question. This data here would certainly help. Secondly, in terms of hiring, do you have any data related to the URM representation of applicants to each job? All other things equal, if representation in applicants is 10%, then it makes sense to expect the URM hiring rate to be 10%. If there is parity between applicants and hiring, then the strategy focus on improving the representation of URM applicants. If instead there is not parity between applicants and hiring (in either direction), then that would lead to a different strategy. Looking forward to seeing additional data come August!

Actions



Neschleba, Patrick Jul 26, 2016 10:59 AM

The statement "White and Asian males are less likely to agree that diversity leads to better team outcomes" may be true based on survey data... but the last thing I want to see is a white male manager, who agrees that diversity leads to better team outcomes, is to be pre-judged as somehow not supporting diversity - or be screened out for future opportunity - because a survey said that men with my skin type tend to agree less with diversity principles.

Actions

1

Search for messages

## Groups



POST REPLY



[The Intel Eliminati](#) >

### New articles on our web site

2 posts by 2 authors



**dr.flywheel**

Feb 1



New articles posted to our web site: [PDX-TIE.ORG](http://PDX-TIE.ORG)

EEOC is actually pushing age discrimination through the courts, for the first time after major rule changes in 2012.

Yesterday I received confirmation that the EEOC investigation of my age discrimination charges against Intel Corp. are in full swing.

All the best.

--Ron

Click here to [Reply](#)



**Minerba Santoscordero**

Feb 1



**Other recipients:** [dr.fl...@gmail.com](mailto:dr.fl...@gmail.com)

Awesome thanks for the update.

Thanks, Minnie  
508-843-1864

- show quoted text -

- show quoted text -

--

You received this message because you are subscribed to the Google Groups "The Intel Eliminati" group. To unsubscribe from this group and stop receiving emails from it, send an email to [pdx-tie+u...@googlegroups.com](mailto:pdx-tie+u...@googlegroups.com).

To view this discussion on the web visit <https://groups.google.com/d/msgid/pdx-tie/a6c62ac2-21e7-446f-845c-c326f7caf047%40googlegroups.com>.

For more options, visit <https://groups.google.com/d/optout>.

## Google Groups

---

### Important Information Provided to BOLI - Expected to affect future investigations

---

dr.flywheel

Aug 3, 2016 3:49 PM

Posted in group: **The Intel Eliminati**

**Please read this information and pass it on to other members of this group.**

On July 7th 2016 I sent an urgent FAX to Chris Lynch (Portland BOLI Operations Manager).  
Click on this link to gain access to the document:

FAX to Chriss Lynch - Portland BOLI Operations Manager.

(Note that certain personal details have been redacted, for privacy reasons)

Though this communication covered my own case, based upon about 11 months of wading through the laws and practices covering age discrimination in employment, it was in fact meant to shed light on the illegal practices of Intel Corp.

The specific issue that I focused on is regarding age discrimination in the context "disparate-Impact" on employees of 40+, who were selected for termination on the basis of SSL grant levels, if their pay grade was in the 7+ category and their "overall compensation" was classified by the Intel HR "pay modeling" application as at, close to, and above "market rate". **Note that this case will NOT cover all of the 2015 and 2016 layoffs. However, for any legal charges filed with EEOC under the ADEA, this is a major legal opening which is much more difficult for Intel Corp. to defend in court than other age discrimination charges.**

At this point the regional office of the EEOC in Seattle has taken over my case (in effect fired BOLI for mishandling) and this would allow selective charges against Intel to be investigated as a collective case.

Note that the full legal argument is a lot more complicated and includes additional details that I cannot yet share. At least until the EEOC investigation is at a more advanced state.

Here is the response that I received from Chris Lynch (BOLI):

*Dear Mr. Tsur –*

*I am reviewing the documents that you faxed yesterday, regarding your employment discrimination complaint filed against Intel on January 12, 2016, and closed by BOLI on May 25, 2016.*

*In your correspondence, you state that you would appreciate quick follow up on your*

*Substantial Weight Review request. Please note that BOLI does not have a Substantial Weight Review procedure. That phrase refers to an EEOC process. If you have questions about that process, you should contact the EEOC's Seattle office at 800-669-4000. The EEOC charge number for your BOLI case is xxx-xxx-xxx*

***Pursuant to OAR 839-003-0065(13), a substantial evidence determination or dismissal may not be appealed to BOLI's Civil Rights Division. That rule notwithstanding, I appreciate your providing additional arguments and observations regarding your claims, and we will review that information for potential relevance in any other complaints filed against Intel.***

*Sincerely,*

*Chris Lynch*

*Portland Operations Manager*

*Civil Rights Division*

*Oregon Bureau of Labor and Industries*

*800 NE Oregon Street, Suite 1045*

*Portland, OR 97232*

*Tel: 971-673-0794*

# AMBITIOUS GOALS, AMAZING PROGRESS

- We exceeded our annual hiring goal, achieving 43.1% diverse hiring against a goal of 40%—up 1.8x hires over 2014.
- We increased hiring of underrepresented minorities by 31% to a total of 11.8% in 2015.
- We increased our hiring of women by nearly 43% to a total of 35% in 2015.
- We narrowed the gap in female representation, ending the year with a workforce that is 24.8% women, a 5.4% increase over 2014.

[Download the annual report](#)

## A SNAPSHOT OF OUR PEOPLE



< Overall U.S.

- Technical U.S.
- Non-Technical U.S.
- Early Career U.S.
- Mid Career U.S.
- Senior U.S.
- Leadership U.S.
- Global Technical
- Global Non-Technical



### Intel currently exceeding overall year 1 hiring goal with 43.3% diversity hires.

	Hires	Hiring %	Goal
Total Diverse <sup>2</sup> Counterpart	1,669	56.7%	
Total Diverse <sup>2</sup>	1,275	43.3%	40.0%
Women	1,035	35.2%	31.0%
African American	139	4.7%	4.4%
Hispanic	222	7.5%	8.4%
Native American	9	0.3%	0.6%
<b>Total</b>	<b>2,944</b>	<b>100%</b>	

Looks like they're advertising Quotas (illegal)

U.S. Workforce Representation as of July 2015									
	Total U.S. Workforce	Technical		Non Technical		Career Stage			
		Representation	Market Availability	Representation	Market Availability	Early Grade	Mid Grade	Senior Grade	Leadership
<b>Gender</b>									
Female	23.1%	19.4%	22.7%	50.0%	50.4%	27.2%	22.7%	15.7%	11.1%
Male	75.9%	80.5%	@MA	50.0%	@MA	72.7%	77.2%	84.3%	82.9%
<b>Ethnicity</b>									
Black or African American	3.5%	3.3%	4.5%	4.2%	5.0%	4.9%	2.7%	1.1%	2.8%
Hispanic	8.3%	8.0%	8.4%	5.9%	10.0%	12.3%	5.9%	3.8%	5.5%
Native American	0.5%	0.5%	0.6%	0.5%	@MA	0.8%	0.2%	0.4%	0.3%
<ul style="list-style-type: none"> <li>■ Increase in representation of 0.2% or greater since December 2014</li> <li>■ Increase in representation between 0.1% and 0.2% since December 2014</li> <li>□ Increase less than 0.1% or no increase in representation since December 2014</li> <li>■ Decrease in representation since December 2014</li> </ul>					<ul style="list-style-type: none"> <li>Numbers may not add to 100% due to rounding, or uncategorized employees</li> <li>Calculations regarding market availability and progress against market availability changes continuously as a result of changes in the composition of Intel's workforce.</li> </ul>				

Which are higher than the talent pool (discrimination)





# INTEL DIVERSITY & INCLUSION

ADDENDUM TO 2016 ANNUAL REPORT



## Notes on Data:

- Data is USA workforce only unless otherwise noted
- Data does not include subsidiaries and does not include Alterra
- Early Grade= salary grades 2 to 5 and equivalent grades & Hourly grades; Mid= salary grades 7 to 9 and equivalent grades; Senior= salary grades 10 & 11 and equivalent grades; Leadership= salary grades 12+ and equivalent grades; Vice President and above, includes Intel Fellows & Senior Fellows
- Ethnicity categories use EEOC Ethnicity definitions
- Definition of "Technical" is based on Intel internal job codes and reflects technical job requirements

## Notes on Data:

- Data labeled "Dec 2015" and "Dec 2014" are from the 2015 Annual Diversity Report
- Data labeled "Dec 2016" are from start of 2016 fiscal year to Dec 31, 2016
- Numbers may not add to 100% due to rounding
- In column titled "Percentage point change since Dec '15", increases of more than 0.2% are bolded green font, and decreases of more than 0.2% are bolded red font
- In column titled "Dec 2016 YTD % of Hires", green bold font indicates hiring % is above representation %

## INTEL OVERALL

INTEL USA	Representation							Change in #	
	Numbers			Percentages			Percentage Point change since Dec '15	# Change since Dec '15	% Change in # since Dec '15
	Dec 2014	Dec 2015	Current: Dec 2016	% of pop. Dec 2014	% of pop. Dec 2015	Current: % of pop. Dec 2016			
Early (Hourly + 2 to 6)	21,181	21,903	19,744	42.1%	40.8%	39.3%	<b>-1.53%</b>	-2,159	-9.9%
Mid (7 to 9)	25,783	27,763	26,485	51.2%	51.7%	52.7%	<b>0.97%</b>	-1,278	-4.6%
Senior (10 & 11)	3,071	3,609	3,538	6.10%	6.72%	7.24%	<b>0.51%</b>	+29	0.8%
Leadership (12+)	332	397	396	0.66%	0.74%	0.79%	0.05%	+1	-0.3%
Other			-						
Total	50,367	53,672	50,263	100.0%	100.0%	100.0%		-3,409	-6.4%
Technical	43,401	45,546	42,468	86.2%	84.9%	84.5%	<b>-0.37%</b>	-3,078	-6.8%
Non-Technical	6,965	8,125	7,793	13.8%	15.1%	15.5%	<b>0.37%</b>	-332	-4.1%
Other	1	1	2	0.0%	0.0%	0.0%		+1	100.0%
Total	50,367	53,672	50,263	100.0%	100.0%	100.0%		-3,409	-6.4%

INTEL USA	Hires and Exits			
	Numbers		Percentages	
	Dec 2016 YTD Hires	Dec 2016 YTD Exits	Dec 2016 YTD % of Hires	Dec 2016 YTD % of Exits
Early Grade	2,973	3,813	<b>57.4%</b>	42.8%
Mid Grade	2,022	4,430	39.0%	49.7%
Senior Grade	167	601	3.22%	6.75%
Leadership	21	65	0.41%	0.73%
Other	-	-	0.00%	0.00%
Total	5,183	8,909	100.0%	100.0%
Technical	4,320	7,343	83.3%	82.4%
Non-Technical	862	1,566	<b>16.6%</b>	17.6%
Other	1	-	0.02%	0.00%
Total	5,183	8,909	100.0%	100.0%

INTEL USA	Representation							Change in #	
	Numbers			Percentages			Percentage Point change since Dec '15	# Change since Dec '15	% Change in # since Dec '15
	Dec 2014	Dec 2015	Current: Dec 2016	% of pop. Dec 2014	% of pop. Dec 2015	Current: % of pop. Dec 2016			
Female	11,836	13,299	12,947	23.5%	24.8%	25.8%	<b>0.98%</b>	-352	-2.6%
Male	38,528	40,360	37,269	76.5%	75.2%	74.1%	<b>-1.06%</b>	-3,095	-7.7%
Unknown Gender	3	13	51	0.01%	0.02%	0.10%	0.08%	+38	292.3%
Gender Total	50,367	53,672	50,263	100.0%	100.0%	100.0%		-3,409	-6.4%
White	27,518	28,616	25,126	54.6%	53.3%	50.0%	<b>-3.33%</b>	-3,490	-12.2%
Asian	16,036	17,627	17,949	31.8%	32.8%	35.7%	<b>2.87%</b>	+322	1.8%
Hispanic/Latino	4,199	4,482	4,119	8.34%	8.35%	8.19%	-0.16%	-363	-8.1%
Black/African American	1,734	1,882	1,874	3.44%	3.51%	3.73%	<b>0.22%</b>	+8	-0.4%
Native American	251	268	301	0.50%	0.50%	0.60%	0.10%	+33	12.3%
Pacific Islander	64	70	108	0.13%	0.13%	0.21%	0.08%	+38	54.3%
Multiracial	521	595	579	1.03%	1.11%	1.15%	0.04%	+16	-2.7%
Unknown Race	44	132	207	0.09%	0.25%	0.41%	0.17%	+75	56.8%
Ethnicity Total	50,367	53,672	50,263	100.0%	100.0%	100.0%		-3,409	-6.4%

INTEL USA	Hires and Exits			
	Numbers		Percentages	
	Dec 2016 YTD Hires	Dec 2016 YTD Exits	Dec 2016 YTD % of Hires	Dec 2016 YTD % of Exits
Female	1,819	2,246	<b>35.1%</b>	25.2%
Male	3,317	6,663	64.0%	74.8%
Unknown Gender	47	-	0.91%	0.00%
Gender Total	5,183	8,909	100.0%	100.0%
White	1,858	5,440	35.8%	61.1%
Asian	2,341	2,233	<b>45.2%</b>	25.1%
Hispanic/Latino	452	742	<b>8.72%</b>	8.33%
Black/African American	260	331	<b>5.02%</b>	3.72%
Native American	22	62	0.42%	0.70%
Pacific Islander	16	9	<b>0.31%</b>	0.10%
Multiracial	112	82	<b>2.16%</b>	0.92%
Unknown Race	122	10	2.35%	0.11%
Ethnicity Total	5,183	8,909	100.0%	100.0%

## TECHNICAL ONLY

TECHNICAL Representation							
TECHNICAL ONLY	Numbers		Percentages				Change in #
	Dec 2014	Dec 2015	Current: Dec 2016	% of pop. Dec 2014	% of pop. Dec 2015	Current: % of pop. Dec 2016	Point change since Dec '15
Early Grade	18,715	19,091	17,354	43.1%	41.9%	40.9%	-1.05%
Mid Grade	22,178	23,548	22,152	51.1%	51.7%	52.2%	0.46%
Senior Grade	2,349	2,710	2,764	5.41%	5.95%	6.51%	0.56%
Leadership	159	197	198	0.37%	0.43%	0.47%	0.03%
Other	-	-	-	-	-	-	-
Total	43,401	45,546	42,468	100.0%	100.0%	100%	-3.07%

TECHNICAL Hires and Exits				
TECHNICAL ONLY	Numbers		Percentages	
	Dec 2016 YTD HRES	Dec 2016 YTD EXITS	Dec 2016 YTD % of HRES	Dec 2016 YTD % of EXITS
Early Grade	2,524	3,215	58.4%	43.0%
Mid Grade	1,073	3,604	38.7%	49.8%
Senior Grade	116	446	2.69%	6.07%
Leadership	7	28	0.16%	0.38%
Other	-	-	-	-
Total	4,320	7,343	100.0%	100.0%

TECHNICAL Representation							
TECHNICAL ONLY	Numbers		Percentages				Change in #
	Dec 2014	Dec 2015	Current: Dec 2016	% of pop. Dec 2014	% of pop. Dec 2015	Current: % of pop. Dec 2016	Point change since Dec '15
Female	8,230	9,176	9,173	19.0%	20.1%	21.6%	1.45%
Male	35,169	36,361	33,251	81.0%	79.9%	78.3%	-1.54%
Unknown Gender	2	9	44	0.00%	0.02%	0.10%	0.08%
Gender Total	43,401	45,546	42,468	100.0%	100.0%	100.0%	-3.07%
White	22,627	22,969	19,566	52.1%	50.4%	46.8%	-3.65%
Asian	15,048	16,513	16,794	34.7%	36.3%	39.5%	3.29%
Hispanic/Latino	3,533	3,670	3,360	8.14%	8.06%	7.91%	-0.15%
Black/African American	1,451	1,522	1,488	3.34%	3.34%	3.46%	0.12%
Native American	216	221	238	0.50%	0.49%	0.56%	0.08%
Pacific Islander	54	57	92	0.12%	0.13%	0.22%	0.09%
Multiracial	434	493	483	1.00%	1.08%	1.14%	0.05%
Unknown Race	38	101	167	0.09%	0.22%	0.39%	0.17%
Ethnicity Total	43,401	45,546	42,468	100.0%	100.0%	100.0%	-3.07%

TECHNICAL Hires and Exits				
TECHNICAL ONLY	Numbers		Percentages	
	Dec 2016 YTD HRES	Dec 2016 YTD EXITS	Dec 2016 YTD % of HRES	Dec 2016 YTD % of EXITS
Female	1,407	1,422	32.6%	19.4%
Male	2,872	5,921	66.5%	80.6%
Unknown Gender	41	-	0.95%	0.00%
Gender Total	4,320	7,343	100.0%	100.0%
White	1,352	4,321	31.3%	58.8%
Asian	2,208	2,036	51.1%	27.7%
Hispanic/Latino	353	588	8.17%	8.01%
Black/African American	195	267	4.51%	3.64%
Native American	17	53	0.39%	0.72%
Pacific Islander	14	7	0.32%	0.10%
Multiracial	86	63	1.99%	0.86%
Unknown Race	95	8	2.20%	0.11%
Ethnicity Total	4,320	7,343	100.0%	100.0%

## NON-TECHNICAL ONLY

NON-TECHNICAL Representation							
NON-TECHNICAL ONLY	Numbers		Percentages				Change in #
	Dec 2014	Dec 2015	Current: Dec 2016	% of pop. Dec 2014	% of pop. Dec 2015	Current: % of pop. Dec 2016	Point change since Dec '15
Early Grade	2,465	2,812	2,390	35.4%	34.6%	30.7%	-3.94%
Mid Grade	3,605	4,214	4,331	51.8%	51.9%	55.6%	3.71%
Senior Grade	722	899	874	10.4%	11.1%	11.2%	0.15%
Leadership	173	200	198	2.48%	2.46%	2.54%	0.08%
Other	-	-	-	-	-	-	-
Total	6,965	8,125	7,793	100.0%	100.0%	100.0%	-332

NON-TECHNICAL Hires and Exits				
NON-TECHNICAL ONLY	Numbers		Percentages	
	Dec 2016 YTD HRES	Dec 2016 YTD EXITS	Dec 2016 YTD % of HRES	Dec 2016 YTD % of EXITS
Early Grade	449	598	52.1%	38.2%
Mid Grade	348	776	40.4%	49.0%
Senior Grade	51	155	5.92%	9.90%
Leadership	14	37	1.62%	2.36%
Other	-	-	-	-
Total	862	1,566	100.0%	100.0%



NON-TECHNICAL Representation									
NON-TECHNICAL ONLY	Numbers			Percentages			Change in #		
	Dec 2014	Dec 2015	Current: Dec 2016	% of pop. Dec 2014	% of pop. Dec 2015	Current: % of pop. Dec 2016	Percentage Point change since Dec '15	# Change since Dec '15	% Change in # since Dec '15
Female	3,605	4,123	3,774	51.8%	50.7%	48.4%	-2.32%	-349	-8.5%
Male	3,359	3,998	4,012	48.2%	49.2%	51.5%	2.28%	+14	0.4%
Unknown Gender	1	4	7	0.01%	0.05%	0.09%	0.04%	+3	75.0%
Gender Total	6,965	8,125	7,793	100.0%	100.0%	100.0%		-332	-4.1%
White	4,891	5,647	5,258	70.2%	69.5%	67.5%	-2.03%	-389	-6.9%
Asian	987	1,113	1,155	14.2%	13.7%	14.8%	1.12%	+42	3.8%
Hispanic/Latino	666	812	759	9.56%	9.99%	9.74%	-0.25%	-53	-6.5%
Black/African American	283	360	406	4.06%	4.43%	5.21%	0.78%	+46	12.8%
Native American	35	47	63	0.50%	0.58%	0.81%	0.23%	+16	34.0%
Pacific Islander	10	13	16	0.14%	0.16%	0.21%	0.05%	+3	23.1%
Multiracial	87	102	96	1.25%	1.26%	1.23%	-0.02%	-6	-5.9%
Unknown Race	6	31	40	0.09%	0.38%	0.51%	0.13%	+9	29.0%
Ethnicity Total	6,965	8,125	7,793	100.0%	100.0%	100.0%		-332	-4.1%

NON-TECHNICAL Hires and Exits				
NON-TECHNICAL ONLY	Numbers		Percentages	
	Dec 2016 YTD Hires	Dec 2016 YTD Exits	Dec 2016 YTD % of Hires	Dec 2016 YTD % of Exits
Female	411	824	47.7%	52.0%
Male	445	742	51.6%	47.4%
Unknown Gender	6	-	0.7%	0.0%
Gender Total	862	1,566	100.0%	100.0%
White	505	1,119	58.6%	71.5%
Asian	133	197	15.4%	12.6%
Hispanic/Latino	99	154	11.48%	9.83%
Black/African American	65	84	7.54%	4.09%
Native American	5	9	0.58%	0.57%
Pacific Islander	2	2	0.23%	0.13%
Multiracial	26	19	3.02%	1.21%
Unknown Race	27	2	3.13%	0.13%
Ethnicity Total	862	1,566	100.0%	100.0%

## EARLY GRADE ONLY (grades 2 to 6, and Hourly)

EARLY GRADE Representation									
EARLY GRADE ONLY	Numbers			Percentages			Change in #		
	Dec 2014	Dec 2015	Current: Dec 2016	% of pop. Dec 2014	% of pop. Dec 2015	Current: % of pop. Dec 2016	Percentage Point change since Dec '15	# Change since Dec '15	% Change in # since Dec '15
Female	5,773	6,124	5,598	27.3%	28.0%	26.4%	-0.39%	-526	-8.6%
Male	15,407	15,776	14,332	72.7%	72.0%	71.6%	-0.45%	-1,644	-10.4%
Unknown Gender	1	3	14	0.00%	0.01%	0.07%	0.06%	+11	366.7%
Gender Total	21,181	21,903	19,744	100.0%	100.0%	100.0%		-2,159	-9.9%
White	11,349	11,482	9,671	53.6%	52.4%	49.0%	-3.44%	-1,811	-15.8%
Asian	5,543	6,061	6,094	26.2%	27.7%	30.9%	3.19%	+33	0.5%
Hispanic/Latino	2,647	2,692	2,332	12.5%	12.3%	11.8%	-0.48%	-360	-13.4%
Black/African American	1,076	1,059	964	5.08%	4.83%	4.88%	0.05%	-95	-9.0%
Native American	180	179	179	0.85%	0.82%	0.91%	0.09%	0	0.0%
Pacific Islander	48	42	76	0.23%	0.19%	0.38%	0.19%	+34	81.0%
Multiracial	319	360	369	1.51%	1.64%	1.87%	0.23%	+9	2.5%
Unknown Race	19	28	59	0.09%	0.13%	0.30%	0.17%	+31	110.7%
Ethnicity Total	21,181	21,903	19,744	100.0%	100.0%	100.0%		-2,159	-9.9%

EARLY GRADE Hires and Exits				
EARLY GRADE	Numbers		Percentages	
	Dec 2016 YTD Hires	Dec 2016 YTD Exits	Dec 2016 YTD % of Hires	Dec 2016 YTD % of Exits
Female	1,152	1,142	38.7%	30.0%
Male	1,807	2,671	60.8%	70.0%
Unknown Gender	14	-	0.5%	0.0%
Gender Total	2,973	3,813	100.0%	100.0%
White	1,008	2,281	33.9%	59.8%
Asian	1,364	774	45.9%	20.3%
Hispanic/Latino	301	476	10.12%	12.48%
Black/African American	151	195	5.08%	5.11%
Native American	14	39	0.47%	1.02%
Pacific Islander	15	4	0.50%	0.10%
Multiracial	81	41	2.72%	1.08%
Unknown Race	39	3	1.31%	0.08%
Ethnicity Total	2,973	3,813	100.0%	100.0%

## MID GRADE ONLY (grades 7, 8, &amp; 9)

MID GRADE Representation									
MID GRADE ONLY	Numbers			Percentages			Change in #		
	Dec 2014	Dec 2015	Current: Dec 2016	% of pop. Dec 2014	% of pop. Dec 2015	Current: % of pop. Dec 2016	Percentage Point change since Dec '15	# Change since Dec '15	% Change in # since Dec '15
	Dec 2014	Dec 2015	Current: Dec 2016	% of pop. Dec 2014	% of pop. Dec 2015	Current: % of pop. Dec 2016	Percentage Point change since Dec '15	# Change since Dec '15	% Change in # since Dec '15
Female	5,580	6,511	6,591	21.6%	23.5%	24.9%	1.43%	+80	1.2%
Male	20,201	21,243	19,860	78.4%	76.5%	75.0%	-1.53%	-1,383	-6.5%

MID GRADE Hires and Exits				
MID GRADE	Numbers		Percentages	
	Dec 2016 YTD Hires	Dec 2016 YTD Exits	Dec 2016 YTD % of Hires	Dec 2016 YTD % of Exits
Female	624	998	30.9%	22.5%
Male	1,368	3,432	67.7%	77.5%

Unknown Gender	2	9	34	0.01%	0.03%	0.13%	0.10%	+25	277.8%
Gender Total	25,783	27,763	26,485	100.0%	100.0%	100.0%		-1,278	-4.6%
White	13,884	14,505	12,945	53.8%	52.2%	48.9%	-3.37%	-1,561	-10.8%
Asian	9,574	10,455	10,543	37.1%	37.7%	40.2%	2.53%	+186	1.8%
Hispanic/Latino	1,435	1,642	1,520	5.57%	5.91%	6.12%	0.20%	+22	+1.3%
Black/African American	613	756	830	2.38%	2.72%	3.13%	0.41%	+74	9.8%
Native American	58	70	97	0.22%	0.25%	0.37%	0.11%	+27	38.6%
Pacific Islander	16	26	29	0.06%	0.09%	0.11%	0.02%	+3	11.5%
Multiracial	185	215	197	0.72%	0.77%	0.74%	-0.03%	-18	-8.4%
Unknown Race	18	93	124	0.07%	0.33%	0.47%	0.13%	+31	33.3%
Ethnicity Total	25,783	27,763	26,485	100.0%	100.0%	100.0%		-1,278	-4.6%

Unknown Gender	30	-	1.48%	0.00%
Gender Total	2,022	4,430	100.0%	100.0%
White	751	2,687	37.1%	60.7%
Asian	920	1,305	45.5%	29.5%
Hispanic/Latino	144	244	7.12%	5.51%
Black/African American	101	125	5.00%	2.82%
Native American	8	19	0.40%	0.43%
Pacific Islander	1	5	0.05%	0.11%
Multiracial	30	38	1.48%	0.85%
Unknown Race	67	7	3.31%	0.16%
Ethnicity Total	2,022	4,430	100.0%	100.0%

## SENIOR GRADE ONLY (grades 10 &amp; 11)

SENIOR GRADE Representation								
SENIOR GRADE ONLY	Numbers		Percentages				Change in #	
	Dec 2014	Dec 2015	Current: Dec 2016	% of pop. Dec 2014	% of pop. Dec 2015	Current: % of pop. Dec 2016	Percentage Point change since Dec '15	# Change since Dec '15
Female	432	594	685	14.1%	16.5%	18.6%	2.37%	+91
Male	2,639	3,014	2,951	85.9%	83.5%	81.1%	-2.40%	-63
Unknown Gender	-	1	2	0.00%	0.03%	0.05%	0.03%	+1
Gender Total	3,071	3,609	3,638	100.0%	100.0%	100.0%		+29
White	2,043	2,352	2,239	66.5%	65.2%	61.5%	-3.63%	-113
Asian	840	1,020	1,119	27.6%	28.3%	30.8%	2.50%	+99
Hispanic/Latino	108	133	151	3.52%	3.69%	4.15%	0.47%	+16
Black/African American	38	58	70	1.24%	1.61%	1.92%	0.32%	+12
Native American	13	18	23	0.42%	0.50%	0.63%	0.13%	+5
Pacific Islander	-	2	3	0.00%	0.06%	0.08%	0.03%	+1
Multiracial	14	17	12	0.46%	0.47%	0.33%	-0.14%	-5
Unknown Race	7	9	21	0.23%	0.25%	0.58%	0.33%	+12
Ethnicity Total	3,071	3,609	3,638	100.0%	100.0%	100.0%		+29

SENIOR GRADE Hires and Exits				
SENIOR GRADE	Numbers		Percentages	
	Dec 2016 YTD HIRES	Dec 2016 YTD EXITS	Dec 2016 YTD % of HIRES	Dec 2016 YTD % of EXITS
Female	38	92	22.8%	15.3%
Male	127	509	76.0%	84.7%
Unknown Gender	2	0	1.20%	0.00%
Gender Total	167	601	100.0%	100.0%
White	86	425	51.5%	70.7%
Asian	53	139	31.7%	23.1%
Hispanic/Latino	7	20	4.19%	3.33%
Black/African American	7	10	4.19%	1.66%
Native American	-	4	0.00%	0.67%
Pacific Islander	-	0	0.00%	0.00%
Multiracial	1	3	0.60%	0.50%
Unknown Race	13	0	7.78%	0.00%
Ethnicity Total	167	601	100.0%	100.0%

## LEADERSHIP ONLY (grades 12+)

LEADERSHIP Representation								
LEADERSHIP ONLY	Numbers		Percentages				Change in #	
	Dec 2014	Dec 2015	Current: Dec 2016	% of pop. Dec 2014	% of pop. Dec 2015	Current: % of pop. Dec 2016	Percentage Point change since Dec '15	# Change since Dec '15
Female	51	70	73	15.4%	17.6%	18.4%	0.80%	+3
Male	281	327	322	84.6%	82.4%	81.3%	-1.05%	-5
Unknown Gender	-	1	1	0.0%	0.0%	0.3%	0.25%	+1
Gender Total	332	397	396	100.0%	100.0%	100.0%		-1
White	242	276	271	72.9%	69.5%	68.4%	-1.09%	-5
Asian	71	91	93	21.4%	22.9%	23.5%	0.56%	+2

LEADERSHIP Hires and Exits				
LEADERSHIP	Numbers		Percentages	
	Dec 2016 YTD HIRES	Dec 2016 YTD EXITS	Dec 2016 YTD % of HIRES	Dec 2016 YTD % of EXITS
Female	5	14	23.8%	21.5%
Male	15	51	71.4%	78.5%
Unknown Gender	1	0	4.8%	0.0%
Gender Total	21	65	100.0%	100.0%
White	13	47	61.9%	72.3%
Asian	4	15	19.0%	23.1%

Hispanic/Latino	9	15	16	2.71%	3.78%	4.04%	0.26%	+1	6.7%
Black/African American	7	9	10	2.11%	2.27%	2.53%	0.26%	+1	11.1%
Native American	-	1	2	0.00%	0.25%	0.51%	0.25%	+1	100.0%
Pacific Islander	-	-	-	0.00%	0.00%	0.00%	0.00%	0	0.0%
Multiracial	3	3	1	0.90%	0.76%	0.25%	-0.50%	-2	-66.7%
Unknown Race	-	2	3	0.00%	0.50%	0.76%	0.25%	+1	50.0%
Ethnicity Total	332	397	396	100.0%	100.0%	100.0%		-1	-0.3%

Hispanic/Latino	-	2	0.00%	3.08%
Black/African American	1	1	4.76%	1.54%
Native American	-	0	0.00%	0.00%
Pacific Islander	-	0	0.00%	0.00%
Multiracial	-	0	0.00%	0.00%
Unknown Race	3	0	14.29%	0.00%
Ethnicity Total	21	65	100.0%	100.0%

GLOBAL DATA										
GLOBAL - INTEL OVERALL	Numbers			Percentages			Changes in %		Changes in #	
	Dec 2014	Dec 2015	Dec 2016	% of population Dec '14	% of population Dec '15	% of population Dec 2016	% pt change since Dec '14	% pt change since Dec '15	# change since Dec '14	# change since Dec '15
Female	23,962	26,540	26,159	24.7%	25.1%	25.8%	1.13%	0.75%	+2,177	-381
Male	73,138	79,315	75,125	75.3%	74.9%	74.1%	-1.15%	-0.77%	+1,987	-4,190
Unknown Gender	13	15	38	0.01%	0.01%	0.04%				
Gender Total	97,133	105,870	101,322	100.0%	100.0%	100.0%			+4,189	-4,548
Technical	83,851	90,015	86,071	86.3%	85.0%	84.9%	-1.38%	-0.08%	+2,220	-3,944
Non-Technical	13,280	15,854	15,251	13.7%	15.0%	15.1%	1.38%	0.08%	+1,971	-603
Other	2	1		0.00%	0.00%	0.00%				
Total	97,133	105,870	101,322	100.0%	100.0%	100.0%			+4,189	-4,548

Global Representation - TECHNICAL ONLY										
GLOBAL - TECHNICAL ONLY	Numbers			Percentages			Changes in %		Changes in #	
	Dec 2014	Dec 2015	Dec 2016	% of population Dec '14	% of population Dec '15	% of population Dec 2016	% pt change since Dec '14	% pt change since Dec '15	# change since Dec '14	# change since Dec '15
Female	16,818	18,311	18,524	20.1%	20.3%	21.5%	1.46%	1.18%	+1,706	+213
Male	67,022	71,693	67,515	79.9%	79.6%	78.4%	-1.49%	-1.20%	+493	-4,178
Unknown Gender	11	11	32	0.01%	0.01%	0.04%				
Total	83,851	90,015	86,071	100.0%	100.0%	100.0%			+2,220	-3,944

Global Representation - NON-TECHNICAL ONLY										
GLOBAL - NON-TECHNICAL ONLY	Numbers			Percentages			Changes in %		Changes in #	
	Dec 2014	Dec 2015	Dec 2016	% of population Dec '14	% of population Dec '15	% of population Dec 2016	% pt change since Dec '14	% pt change since Dec '15	# change since Dec '14	# change since Dec '15
Female	7,163	8,229	7,635	53.9%	51.9%	50.1%	-3.87%	-1.84%	+472	-594
Male	6,115	7,621	7,610	46.0%	48.1%	49.9%	3.85%	1.83%	+1,495	-11
Unknown Gender	2	4	6	0.02%	0.03%	0.04%				
Total	13,280	15,854	15,251	100.0%	100.0%	100.0%			+1,971	-603



# Intel Lays Off 12,000 After Seeking Visas to Import 14,523 Foreign Professionals Since 2010



Reuters

1,570

by **WARNER TODD HUSTON**  
21 Apr 2016

Technology giant Intel announced April 19 it will fire 12,000 skilled U.S.-based professionals — after already swelling its workforce with 14,523 requests in Washington D.C. since 2010 for visas to import foreign professionals through the controversial H-1B and Green Card programs.

The [company said](#) the layoffs were part of a restructuring plan to help shift its focus from desktop PCs to mobile devices. But the company is very profitable, and first-quarter 2016 profits were [14 percent above](#) predictions.

## SIGN UP FOR OUR NEWSLETTER

**SUBMIT**

Amid the layoffs, Intel is one of the nation's largest users of the H-1B outsourcing program which allows companies such as [Disney](#) and [Abbot Laboratories](#) to replace white-collar American

professionals with cheaper professionals from India, China, and other countries.

Intel has insisted that it cannot find enough skilled American workers to fill its needs. From 2010 to 2015, it [filed requests](#) for up to 8,351 H-1B visas, plus 5,172 applications for permanent Green Cards for its foreign employees, according to MyVisasJobs.com. That data shows the company sought to hire 14,523 foreign professionals instead of many Americans eager to work at Intel.

The MyVisaJobs.com site, which presents data prepared by government agencies, also shows that the company even sought work visas for [445 people](#) who arrived in the country as students carrying [F-1 visas](#).

The number of foreign professionals hired is uncertain. However, the [MyVisaJobs.com](#) data shows that 2,654 Green Card requests were approved in the five years between 2015 and 2011. Also many of the H-1B requests were made when the economy was stalled, and so many were likely granted. If one-third of its H-1B visa-requests were granted, then Intel was able to hire 3,000 H-1B workers from 2010 to 2015.

Intel's press aides declined to respond to calls and emails from Breitbart.

Intel's hires are not lower-status "tech workers," such as software-testers or software-maintenance programmers. Instead, Intel imported foreign college-graduates [for prestigious jobs such as](#) electronics engineers, industrial engineers or computer and information research scientists. These H-1B workers can stay for six years, or longer, and some get Green Cards, which grant lifetime work permits.

There's no shortage of U.S. engineers looking for jobs at Intel.

The U.S. marketplace includes many Americans — often older and experienced, but who ask for higher wages to pay for [their families](#) — who are eager to work at Intel's outsourced jobs. For example, on April 21, Indeed.com offered resumes of [16,576 people](#) seeking jobs as electronics engineers in Santa Clara, Calif., the company's home town. They included Robert Hill of Cupertino, Calif., Ray Chen in San Mateo, Calif., and Aubrey Calder in Mountain View., Calif.

Nationwide, companies and universities employ roughly 800,000 lower salary white collar guest workers. That total is roughly equivalent to the number of Americans who graduate each year with degrees in business, medicine, technology, computers, and architecture. The resident population of white collar guest-workers includes roughly [100,000 lower wage professors, doctors, scientist and other professionals](#) employed by U.S. universities and their affiliated business partners. These guest-workers help lower first-year salaries for American graduates, so lowering the Americans' lifetime earnings.

The H-1B visa program isn't the only program used to import foreign workers into the country. Late last year [the Obama administration expended](#) the Optional Practical Training (OPT) visa program, which is allowing 120,000 foreign students to work with companies, many of whom rely on the universities for hires.

Because of corruption, agencies are trying to crack down on [fake universities](#) that import foreign [fake students](#) for work at U.S. companies, and companies that use the [H-1B system](#) to get foreign workers for rent to American companies.

Intel's critics say Intel has used illegal methods to reduce white-collar salaries in California's Silicon Valley. Intel was a defendant in a 2011 class action lawsuit filed against a group of tech companies, including Apple and Google. [The lawsuit was settled](#) in 2015 for \$415 million.

For its part, Intel claims that the H-1B visa program is a good thing for the country and, [according to Intel spokesperson Lisa Malloy](#), "sustains our national competitiveness, drives economic growth, and creates jobs in the process."

Along with other companies, such as Microsoft and Qualcomm, Intel was part of the group of business giants that allied with Democrats and with Florida Republican Sen. Marco Rubio to pressure GOP politicians to accept the 2013 "Gang of Eight" immigration bill. The unpopular bill, which included a huge increase in the importation of immigrants and H-1B guest workers, as well as a blanket amnesty for millions of illegals already here, failed when GOP voters ejected GOP House Majority Leader Rep. Eric Cantor, in his June 2014 primary election.

Since then, political outsider Donald Trump has put himself on track to the GOP's 2016 nomination by promising to [reform the nation's immigration](#) and guest worker systems to help Americans. For example, he has said he would reduce the inflow of H-1Bs by raising the minimum wage for H-1B workers, and has called for one year "[pause](#)" in legal immigration. Trump's main rival, Sen. Ted Cruz, has also called for a [pro-American reform](#) of the labor market, saying it will drive up Americans' wages and spur [technology development](#).

Their failed GOP rivals — including Gov. Jeb Bush and Gov. Marco Rubio — declined to call for pro-American immigration reform. In fact, Bush's economic platform called for [increased outsourcing](#) of U.S. jobs to imported foreign professionals.

Currently, four million Americans turn 18 each year, and the nation's government annually imports [roughly one million new legal](#) immigrants and workers, plus hundreds of thousands of [illegal immigrants](#) and roughly 700,000 temporary guest workers, including the six-year H-1B professionals. In 2013, the inflow of foreign labor helped [reduce wages and boosted the stock market](#).

*Follow Warner Todd Huston on Twitter [@warnerthuston](#) or email the author at [igcolonel@hotmail.com](#)*



# Intel wins Nike-style tax deal, just ahead of the deadline



Intel is spending at least \$6 billion dollars to build a pair of new research factories, collectively known as D1X, at its Ronler Acres campus in Hillsboro. (Bruce Ely/The Oregonian)



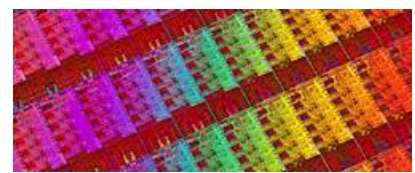
By **Mike Rogoway | The Oregonian/OregonLive**

[Email the author](#) | [Follow on Twitter](#)

on December 06, 2013 at 11:15 AM, updated December 06, 2013 at 8:46 PM

This was only a matter of time.

Gov. John Kitzhaber signed off Friday on tax assurances for Intel, **the same guarantees Nike won from the state Legislature** last year when the sports apparel company promised a major expansion of its Oregon operations. That **deal assured Nike** that the state's corporate income tax structure, favorable to large companies that do most of their business out of state, won't change.



Lawmakers rewrote that bill at the last minute to make Intel eligible for the same guarantees, but gave Intel only until the end of December 2013 to secure its own deal with the governor. Kitzhaber has now signed off on those assurances for Intel, four weeks ahead of the deadline.

In exchange, Intel said it plans to hire 500 more workers and make an additional, \$500 million investment in D1X, its multibillion-dollar research factory now under construction in Hillsboro.

Intel had already committed to expanding the factory months before the Legislature began consideration of Nike's bill last year, and construction started in February. So the state isn't getting any additional economic investment as a result of Friday's 30-year deal.

"This is nothing new," said Neil Tunmore, vice president of Intel's manufacturing group. "This is just continued expansion of the site."

But Kitzhaber said it's not costing Oregon anything extra, either.

"This is not a revenue loser for the state," the governor said Friday morning in a conversation with The Oregonian's editorial board. "This is tax certainty."

And Intel said that certainty is one element that sets Oregon apart from other places where it considers operating.

"Oregon has been extraordinarily stable," said Diana Daggett, Intel's director of corporate affairs in the Americas. "There are locations where that is not the case, where tax certainty is an issue that we look at."

The new agreement locks in the state's "single sales factor" corporate tax structure for Intel, as last year's deal did for Nike. The state began phasing in that tax structure in 1991 at the urging of Intel and other large corporations, and finished the process in 2005.

Single sales means that corporate taxes are calculated based only on sales within the state. Because Intel, like Nike, does most of its business outside Oregon, its income taxes are probably near the state minimum.

There's been no serious discussion of changing the way large companies' incomes are taxed in Oregon, and the deal doesn't cut Intel's taxes any further – but it does guarantee that the state's tax structure won't change. That provides tax certainty – something big companies such as Intel welcome when they're investing billions of dollars in a project they hope will last a decade or longer.

To some, though, 30 years is just too long to provide tax assurances to anyone.

ADVERTISING

"We have no idea what's going to happen in the world in the next 30 years and it's silly for the state to think that it should sign 30-year agreements with any business," said Jody Wiser of Tax Fairness Oregon. "We shouldn't be tying future legislators hands forever. That's irresponsible."

[Intel's diversity effort produces mixed results](#)

[Confusion and doubt as Trump considers new rules for skilled foreign workers](#)

[Don't forget Intel's layoffs \(Letter to the editor\)](#)

[Intel, moving beyond PCs, seeks explosive growth in new technologies](#)

[Intel tells Trump it will spend \\$7 billion to open idle factory in Arizona](#)

[All Stories](#)

Though its headquarters are in California, Intel's largest and most advanced operations are in Oregon. The company has a singular economic influence in the state, employing 17,000 at its Washington County campuses – more people than any other business in the state. And the billions of dollars Intel is spending to build D1X is propping up Oregon's construction industry at a time when it has been suffering badly in the wake of the Great Recession.

The timing of Friday's announcement is less than ideal, however, because Intel – for one of the few times in its nearly four-decade history in Oregon – is a focus of controversy. The company acknowledged earlier this year that it had failed to disclose fluoride emissions at its Oregon manufacturing campus.

While Intel and state regulators insist the emissions posed no health risk, the company has acknowledged that **the flub cost it credibility with the community**. And the fluoride emission has greatly complicated the air quality permit Intel seeks for the D1X expansion.

Neighbors and environmentalists, who have been generally receptive to Intel, were outraged by the fluoride omission and some have threatened to sue. Last month, activists delivered an online petition to Kitzhaber with more than 2,500 signatures asking that Intel be held to higher environmental standards.

It's been obvious for a long time that Intel would seek the Nike-style tax assurances. The original bill proposed on Nike's behalf specifically excluded Intel and other companies that receive property tax breaks under the state's Strategic Investment Program (SIP).

When Intel learned it had been written out of the deal, **company officials angrily chastised their counterparts at Nike in private conversations**. And Kitzhaber went before lawmakers to urge a rewrite to include Intel. A month after the rewritten deal passed, Intel conducted a phone survey to gauge residents' attitudes about the company and its own tax guarantees. **The company acknowledged then that it was contemplating asking for the same deal Nike got**.

On Friday, Kitzhaber said he and Intel had begun conversations on the new tax assurances last summer.

Intel already receives tax breaks well in excess of what any other Oregon business enjoys. Its current SIP tax breaks exempt up to \$25 billion in Intel equipment from the property taxes that other businesses pay. SIP tax breaks have saved Intel more than \$500 million since 2001, according to Washington County officials.

Unlike Nike's deal, the Intel agreement announced Friday does not limit the company's participation in the SIP program.

Intel's current SIP took effect in 2010. Intel said the spending binge that followed, led by at least \$6 billion for D1X alone, means that it will exhaust its \$25 billion limit in 2016 -- years ahead of schedule.

The company is likely to seek an a new SIP agreement with Hillsboro and Washington County in the very near future, but Washington County and Intel officials say that those conversations have not started yet.

The city and county will have considerable leverage in those discussions, should they choose to use it, because Intel is counting on D1X to lead its transition to a new generation of manufacturing tools and larger silicon wafers within the next few years.

It's nearly inconceivable that Intel would walk away from the billions of dollars it's invested in D1X and try to move the thousands of researchers it employs in Hillsboro – even if those talks result in several million dollars a year in additional taxes or fees.

*The Oregonian's Christian Gaston contributed to this report.*

-- **Mike Rogoway**; twitter: **@rogoway**; 503-294-7699




Registration on or use of this site constitutes acceptance of our **User Agreement** and **Privacy Policy**

© 2017 Oregon Live LLC. All rights reserved (**About Us**).

The material on this site may not be reproduced, distributed, transmitted, cached or otherwise used, except with the prior written permission of Oregon Live LLC.

**Community Rules** apply to all content you upload or otherwise submit to this site.

 **Ad Choices**



benjamin barber <starworks5@gmail.com>

---

## Intel/RealSense Submission

6 messages

---

**Mccray, TammyX** <tammyx.mccray@intel.com>  
To: "barberb@barberb.com" <barberb@barberb.com>

Tue, Mar 10, 2015 at 12:12 PM

Hi Benjamin,

My name is Tammy McCray and I am an Account Manager with the Software and Services Group at Intel.

I received your information from your entry in the Intel RealSense App Challenge.  
**Congratulations** on your idea being accepted!

This year Intel has a strategic initiative working with RealSense Technology that I would like to share with you.

I would like to speak to you about the idea you submitted and an opportunity for a potential strategic partnership with Intel.

If you have some time to connect, let me know what works best with your schedule.

Best Regards,

Tammy

Tammy McCray

Intel Scale Software Alliances

[Tammyx.mccray@intel.com](mailto:Tammyx.mccray@intel.com)

Skype: tammy.m.intel3

801-786-5696



---

**benjamin barber** <barberb@barberb.com>  
To: "Mccray, TammyX" <tammyx.mccray@intel.com>

Tue, Mar 10, 2015 at 1:35 PM

Hi Tammy,

Thank you for reaching out. If i remember correctly the idea that I wanted to implement, was to use the intel real sense camera with oculus rift. I bought an FPGA development board and the oculus, but I was told by many that the minnowboard doesn't support the camera. Instead I decided to undertake an internet voting project, by signing an agreement with Sensory Inc. to have free access to their API's in exchange for me releasing code to them. Two years ago during the last legislative session, I spoke with Oregon Secretary of State (now Governor) Brown and Oregon Senator Ginny Burdick, and I had a bill put forth for internet voting that died in committee.

As for the time available, please let me know what works for you, I have a part time job currently and am fairly flexible, the remainder of my time goes into academic research.

[Quoted text hidden]

---

**benjamin barber** <barberb@barberb.com>  
To: "Mccray, TammyX" <tammyx.mccray@intel.com>

Tue, Mar 10, 2015 at 1:45 PM

As for the other academic research involving intel products, I'm working on a semi-autonomous vehicle which I need a SLAM model for, and solar powered servers on edison which run the TOR service and a Content Management System that publishes .torrents integrated into the Bittorrent Maelstrom and Bittorrent Sync project.

---

**Mccray, TammyX** <tammyx.mccray@intel.com>  
To: benjamin barber <barberb@barberb.com>

Tue, Mar 10, 2015 at 3:50 PM

Hi Ben,

Thank you for returning my call. I am sorry I was unable to respond to your email sooner as I was in a meeting.

I wanted to speak with you about your RealSense entry application and see what the application is and does. And to see what your future plans are for the application.

I'll send out a calendar invite so it will be on my schedule and yours.

Talk to you soon.

Best Regards,

Tammy

**From:** [starworks5@gmail.com](mailto:starworks5@gmail.com) [mailto:[starworks5@gmail.com](mailto:starworks5@gmail.com)] **On Behalf Of** benjamin barber  
**Sent:** Tuesday, March 10, 2015 2:35 PM  
**To:** Mccray, TammyX  
**Subject:** Re: Intel/RealSense Submission

[Quoted text hidden]

---

**Mccray, TammyX** <[tammyx.mccray@intel.com](mailto:tammyx.mccray@intel.com)>  
To: benjamin barber <[barberb@barberb.com](mailto:barberb@barberb.com)>

Tue, Mar 10, 2015 at 3:52 PM

Hi Ben,

Here is a calendar Invite for tomorrow morning. 3/11 – 10:00 PST

Talk to you soon.  
Tammy

---

**From:** [starworks5@gmail.com](mailto:starworks5@gmail.com) [mailto:[starworks5@gmail.com](mailto:starworks5@gmail.com)] **On Behalf Of** benjamin barber  
**Sent:** Tuesday, March 10, 2015 2:35 PM  
**To:** Mccray, TammyX  
**Subject:** Re: Intel/RealSense Submission

Hi Tammy,

Thank you for reaching out. If i remember correctly the idea that I wanted to implement, was to use the intel real sense camera with oculus rift. I bought an FPGA development board and the oculus, but I was told by many that the minnowboard doesn't support the camera. Instead I decided to undertake an internet voting project, by signing an agreement with Sensory Inc. to have free access to their API's in exchange for me releasing code to them. Two years ago during the last legislative session, I spoke with Oregon Secretary of State (now Governor) Brown and Oregon Senator Ginny Burdick, and I had a bill put forth for internet voting that died in committee.

As for the time available, please let me know what works for you, I have a part time job currently and am fairly flexible, the remainder of my time goes into academic research.

On Tue, Mar 10, 2015 at 12:12 PM, Mccray, TammyX <[tammyx.mccray@intel.com](mailto:tammyx.mccray@intel.com)> wrote:  
Hi Benjamin,

My name is Tammy McCray and I am an Account Manager with the Software and Services Group at Intel.

I received your information from your entry in the Intel RealSense App Challenge.  
***Congratulations*** on your idea being accepted!

This year Intel has a strategic initiative working with RealSense Technology that I would like to share with you.

I would like to speak to you about the idea you submitted and an opportunity for a potential strategic partnership with Intel.

If you have some time to connect, let me know what works best with your schedule.

Best Regards,  
Tammy

Tammy McCray  
Intel Scale Software Alliances  
[Tammyx.mccray@intel.com](mailto:Tammyx.mccray@intel.com)  
Skype: tammy.m.intel3  
[801-786-5696](tel:801-786-5696)



---

Mccray, TammyX <[tammyx.mccray@intel.com](mailto:tammyx.mccray@intel.com)>

Wed, Mar 11, 2015 at 10:40 AM

To: benjamin barber <barberb@barberb.com>

Hi Benjamin,

Thank you so much for your time today. Thank you for all the great information you gave me. You have some really great ideas, I would say keep going and keep my contact information. Let me know when you have something that is further into the development stages and I can see if it will fit with one of our initiatives this year. Right now what we are looking for is a project that is being developed and/or has been developed with RealSense. We need great software and ideas to showcase Intel Hardware and so that is what our marketing team is looking for at this time.

Again Thank you for your time and information.

Best Regards,

Tammy

**From:** [starworks5@gmail.com](mailto:starworks5@gmail.com) [mailto:[starworks5@gmail.com](mailto:starworks5@gmail.com)] **On Behalf Of** benjamin barber  
**Sent:** Tuesday, March 10, 2015 2:35 PM  
**To:** Mccray, TammyX  
**Subject:** Re: Intel/RealSense Submission

Hi Tammy,

[Quoted text hidden]

[Quoted text hidden]



# Jaguar Land Rover's new Portland lab seeks to make automotive tech driver-friendly



By **Mike Rogoway** | [The Oregonian/OregonLive](#)

[Email the author](#) | [Follow on Twitter](#)

on April 19, 2015 at 5:05 AM, updated April 20, 2015 at 10:22 AM

Picture yourself driving into Portland on the freeway, craving some coffee.

Ask the car's navigation system for the nearest Starbucks. Instead of giving you the address, it projects a translucent green line on your windshield, tracing a route on the road and guiding you off I-405 to a coffee shop near Portland State.

In Jaguar Land Rover's new lab in Portland's Pearl District, three-dozen researchers are imagining the ride of the future. In a converted warehouse, they're testing concepts that could make driving safer - or at least more entertaining.

Technology and autos have had an uneasy relationship for a long time. Carmakers have generally been slow to adopt innovations from the much-faster tech industry, resulting in features that are clunky or quickly obsolete.

Worse, the advent of smartphones has turned mobile tech into a hazard, distracting drivers who seem unable to resist the pings calling them to respond to a constant stream of texts and e-mails and social media.

It may not have to be that way. Nearly every automaker now has a research lab like Jaguar Land Rover's, studying better ways to integrate technology and driving.

And every big tech company, from Apple to Google to Intel, has its own automotive initiative. They're all working to improve mobile technology for drivers and - in time - shift the responsibility for driving to the computers altogether.

Matt Jones, a veteran Jaguar Land Rover engineer from England, said his facility is working to understand drivers as well as technology. It's expanding rapidly in Portland, hiring 50 more engineers and adding a startup incubator to help uncover new concepts.

"We don't make people dangerous," Jones said. "We allow them to do what they want in the car, safely."

Jaguar Land Rover's Portland site is its only product development site outside the United Kingdom, Jones said, "and we're the only one in the world with pinball machines."

The pinball machines are for the software engineers, not the drivers. It's an amenity (Jaguar Land Rover, or JLR, also has colorful, open workspaces and, perhaps unusually for an automaker, bike parking) to help attract Portland's in-demand technologists.

## Startup lab

Jaguar Land Rover plans to add 25,000 square feet near its existing Pearl District office to host 50 more engineers to work with a dozen startups each year developing new technologies and finding ways to apply them to the auto industry.

JLR plans to begin taking applications in May for the incubator's first class, which would begin late this year. Startups will spend six months in the facility, receiving an unspecified investment from JLR and assistance from the automaker's engineers.

Plans calls for 120 companies to participate over 10 years.

Nestle into a car seat inside the lab and choose a car - coupes, high-end off-roaders, sedans - and take off down the Pacific Coast Highway or through Yosemite.

A giant, wraparound screen creates the illusion you're actually driving, so JLR's engineers can study which technologies make drivers better and which become a distraction. As you drive, researchers might toss in a potential distraction - a beach ball, perhaps, or a bear - and measure how well you respond.

One concept captures images of road signs on camera. If a semi drives between you and the sign, the car projects an image of the sign on the windshield - right where it would be if the truck wasn't in the way.

Most automakers have their tech outposts in Silicon Valley. JLR came to Portland in large part because of ongoing work with Intel, which has been investing for years in automotive technologies - one of the chipmaker's many efforts to diversify beyond the stagnant PC market.

Three years ago, Intel established a \$100 million investment fund to pursue automotive technologies. It has its own research efforts around the world, from Hillsboro to Germany, seeking new ways to apply Intel's computing power.

Working with Ford, Intel developed cameras that look inside a vehicle. Facial recognition technology might identify a driver, or sound an alert if the cameras catch a driver's attention wandering away from the road.

"These technologies and capabilities will enter the vehicle somewhat incrementally," said Elliot Garbus, an Intel vice president in Arizona who runs the chipmaker's automotive group. And as those new concepts arrive, Garbus said drivers sometimes react in unexpected ways.

For example, some new vehicles already come with "adaptive cruise control," which monitors other cars on the freeway - automatically slowing down to match the pace of surrounding traffic. Garbus said drivers new to the technology aren't sure how to react.

"There is a moment of anxiety: Should I hit the brake or should I let the technology do what it's supposed to?" he said. "They described it as a white-knuckle moment for them. It's just panic."

One solution, Garbus said, is to ensure drivers understand what a car is doing and why with clear, simple displays. Another is to give cars the ability to learn how drivers react - some might slow earlier than others, for example - and teach the car to react in the same, familiar way.

Tech companies and the auto industry have been slow to make such driver-friendly adaptations, according to Garbus. Part of the problem is that the auto industry's design cycle runs three to five years, making it difficult to bake in cutting-edge mobile technologies that are obsolete within months.

Automakers are also reluctant to cede their brand power to Apple or Google, Garbus said. They want to retain some technological distinctiveness.

"It's a battle of the ecosystems," Garbus said.

Drivers, meanwhile, are frustrated by existing automotive technologies, said Mark Boyadjis, a senior automotive analyst for the research firm IHS. There's too much variation in how they work, too many proprietary designs that confuse people.

"Everyone knows how to press an accelerator. It's the same in every car. But navigation, (wireless) Bluetooth, they're not created equal," Boyadjis said. "There's some that are wildly worse."

Automakers now recognize that installing substandard technology will undermine a company's brand and customer loyalty, and they're getting smarter about understanding how to work with the tech industry.

Luxury brands including Jaguar Land Rover will be among the first to take advantage of the new paradigm, Boyadjis said, because they have a customer base that can afford the latest and greatest amenities. But until recently, he said, JLR's technology was "among the worst to use in the market."

Boyadjis said the new Portland lab reflects the influence of Tata Motors, an Indian company that bought JLR from Ford in 2008. He said Tata infused the company with cash and a sense of urgency around new technologies.

JLR's ongoing Portland expansion underscores just how seriously the automaker takes driving technologies.

"Companies don't make major investments like JLR has made," Boyadjis said, "unless the market is going that direction."

-- Mike Rogoway

[mrogoway@oregonian.com](mailto:mrogoway@oregonian.com)

503-294-7699

[@rogoway](#)

Registration on or use of this site constitutes acceptance of our **User Agreement** and **Privacy Policy**

© 2017 Oregon Live LLC. All rights reserved (**About Us**).

The material on this site may not be reproduced, distributed, transmitted, cached or otherwise used, except with the prior written permission of Oregon Live LLC.

**Community Rules** apply to all content you upload or otherwise submit to this site.

[▶ Ad Choices](#)

**Jared Wiener**  
@JaredCWiener

Follow

"How do you quantify ROI of diversity?" Great question during [#Techtownpdx](#) event!

LIKES

5



7:51 PM - 21 Feb 2017

1

5



**Zoe Piliakas** @ZoeVoxSiren Feb 21  
[@JaredCWiener](#) huge question

# National Programming Skills Report



# Introduction

It is our pleasure to present the first edition of Automata report. Programming Ability skill is the key for jobs in IT centric world.

In the last few years, thanks to jobs becoming global, the importance of good programmers has increased manifold. It has over the years become an important criteria of hiring for most of the IT software companies, both at the international and intra-national levels. A candidate with good programming skills is so important , because there are cases where one doesn't understand the program statement and if does then fails to implement it properly.

The report tries to identify patterns in employability across different regions, analyzing in detail the distribution of employability across various roles. Herein, it studies how employability varies across different groups: We do the first systematic study of Programming Ability of engineers across India. The study is based on Automata, an automated tool measuring programming skills used across the world by industries. Automata is a 60 minute test taken in compiler integrated environment. It rates the candidates on multiple parameters of Programming Ability , Programming Practices, run-time complexity and test case coverage. It uses advanced artificial intelligence technology to automatically grade programming skills.

The report follows the tradition of our National Employability Reports to uncover the gaps in Programming Ability by gender, tier of college, top 100 colleges vs. rest of the colleges, etc. Based on the reports, we have come up with specific suggestions on how to improve Programming Ability in various parts of the country.

With commitment to the development and progress of higher education in India!



# Executive Summary

The key findings of the present study are as follows:

## ☐ **Only 36% engineers are able to write compilable code**

With the advancement in digital services and products, good programmers are the constant requirement of industry. Companies require candidates with strong understanding of computer programming and algorithm to implement on new innovative ideas in a time constraint workplace. Unfortunately, we find that out of the 2 problems given per candidate, only 14% engineers are able to write compilable codes for both and only 22% write compilable code for exactly one problem. To sustain the growth of IT industry, we need candidates with high technology caliber and better programming skills.

## ☐ **Lack of adequate knowledge to build a logically correct, maintainable code is the key reason for low employability**

Only 14.67% engineers are employable for IT Services company. While a worryingly low percentage of 2.47% are observed to be employable in IT Product company. It should be noted that this has been calculated according to the current requirement and hiring policy adopted by these 2 sectors. Where IT Services companies require trainable programmers with sound logics, who may or may not possess in-depth knowledge. However, IT Product companies require substantial competence in programming algorithms. The key reason behind such paltry employability percentages is deficient skills to apply basic programming and algorithm principles. These concept and principles are there in college curriculum, which indicates that there is a gap in implementation. Hence, these industries shall have a very hard time in hiring students for their organization who are able to fit in the criteria and yield required results.

# Executive Summary

## ☐ **As low as 2.21% engineers possess the skill to write a fully functional code with best efficiency and writing practices**

Functionally correct code is the basic requisite of a good programmer. However, to enhance the quality of the code, few more important indicators have emerged - efficiency, time complexity and space complexity. Nothing is more time consuming than dealing with badly written code which leads to enormous bugs & exceptions. The analysis unveils that only 2.21% engineers possess the skillset to write logically correct code with best efficiency & least time-space complexity.

## ☐ **Programming Practices and Programming Ability are the areas of maximum skill gap across demographics**

Engineers show larger skill gap in Programming Practices and Programming Ability abilities. Programming Practices is the ability to code in readable & maintainable fashion and Programming Ability is the ability to code in most optimized way. We find that these two are the major areas of differences when compared across various demographics such as gender, tier of colleges, and top 100 colleges. There is a need to put emphasis on improving the code quality.

# Table of Contents

- ❑ Introduction
- ❑ Executive Summary
- ❑ Methodology
- ❑ Tool Description : About Automata
- ❑ Programming Ability Score Distribution
- ❑ Distribution across demographics
  - ❑ By Gender
  - ❑ By Tier of college
  - ❑ By Top 100 campuses vs. the rest
  - ❑ By Zone
- ❑ Programming Ability across difficulty of problem

# Methodology

This report is based on a sample of more than **36,800** students from **500+** colleges across India. The properties of the data set are given in the table below.

PARAMETER	STATISTICS	
Gender ratio	Male-61.1%, Female-38.9%	
% candidates in different Tiers of Colleges	Tier1-28.7%, Tier2-22.7%, Tier3-31.3%	
% candidates in Top 100 colleges and rest of the colleges	Top 100 colleges - 15.3%, Rest of the colleges - 75.9%	
% candidates in Key Cities (city of college)	New Delhi-3.0% Chennai-7.6% Kolkata-1.7%	Mumbai+Pune-6.5% Bengaluru-3.8% Hyderabad-7.6%
% candidates in Zones (city of college)	East-10.2% West-14.3%	North-26.7% South-47.5%

Together with the Automata scores, the various demographic details of the candidates are also captured by Aspiring Minds testing platform, which has enabled a comprehensive and meaningful analysis provided in the report.

# Programming Skills

## What is the key problem?

Automata is an **automated programming ability evaluation** tool that uses a simulation compiler integrated environment to predict a candidate's ability to develop code that is functionally correct, generates expected outputs, is efficient and follows best coding practices. A **curated question bank, validated empirically, with problems testing different aspects** of data structure usage and algorithmic approaches is used.

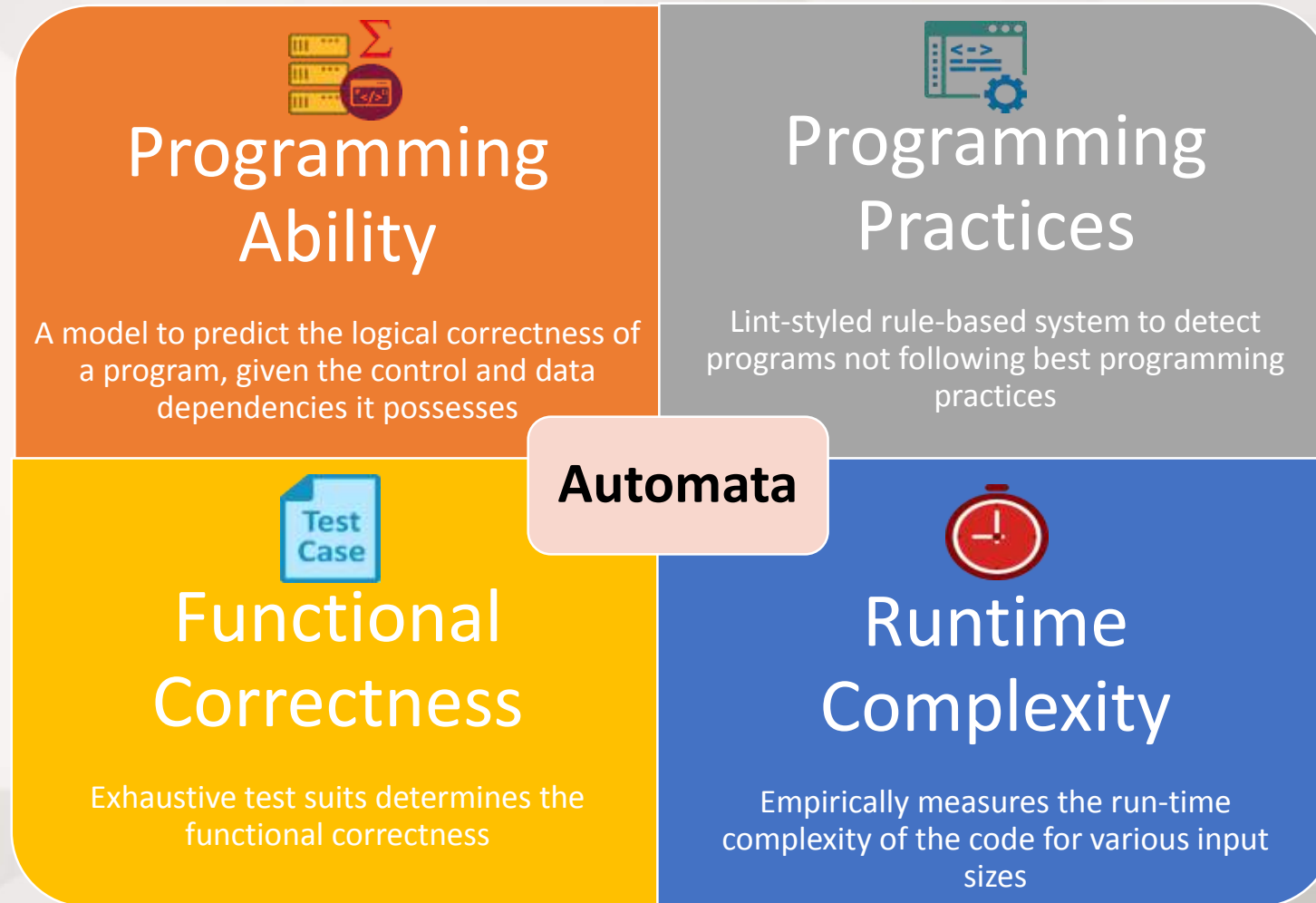
The tool can predict job suitability of a candidate by evaluating his/her coding ability on the following parameters:

- ☐ **Programming Ability** – evaluates the implementation of right algorithm using the control-structures, data dependencies and relevance of solution.
- ☐ **Programming Practices** – evaluated the code for the best practices implemented across industry while developing code which enhances its readability and usability.
- ☐ **Runtime complexity** – evaluated the runtime complexity by comparing to the runtime complexity of a optimized code.
- ☐ **Functional correctness** – measures the degree of code correctness based on the test-suite coverage by the developed code. They type of test cases evaluated are: Basic, Advanced and Edge.
- ☐ **Final score** – calculates overall score by weighing the candidate's performance in each of the 4 metrics.

Based on these parameters, the Automata Feedback Report predicts the skills required to develop algorithm in various coding jobs in the software/IT industry.

# Programming Skills

## Automated Programming Ability Evaluation





# Programming Skills

## Automated Programming Ability Evaluation

### Automata – Aspiring Minds' Programming Ability Assessment:

- ☐ **Research driven holistic** evaluation that can be combined with other assessments.
- ☐ **Automated simulation** based test with easy option to compile, execute and save programs.
- ☐ Scoring on the basis of **standard rubrics** with very high correlation to different parameters.
- ☐ **Accurate prediction and scoring** of Programming Ability , Programming Practices, Runtime Complexity and Functional Correctness parameters.
- ☐ **Abridged problem statements** in candidate's choice of programming language – C, C++ and java.
- ☐ **Standardized and validated** approach leading to effective and efficient hiring.

# National Status of Programming Skills

Rubric	Definition	Grand Total*
A4	Candidate is able to write functionally and logically correct code	2.21%
A3	Candidate is able to write functionally correct code with few anomalies	2.56%
A2	Candidate is not able to write functionally correct code	31.01%
A1	Candidate is not able to write compilable code	64.22%

\* Distribution of test takers across various defined levels.

✓ Programming Ability rubrics are divided into four broad divisions on the basis of 4 sub-sections of Automata

# National Status of Programming Skills

Rubric	Definition	Grand Total*
A4.4	Candidate is able to write functionally-logically correct, efficient & maintainable code	63.84%
A4.3	Candidate is able to write functionally-logically correct, efficient code. However, the code written is unmaintainable	8.98%
A4.2	Candidate is able to write functionally-logically correct, maintainable code. However, the code written is low on efficiency	25.22%
A4.1	Candidate is able to write functionally-logically correct code. However, the code written is low on efficiency & maintainability	1.97%

\* Distribution of test takers across various defined levels.

✓ Functionally correct codes of level A4 are further categorized on the basis of attributes of written code

# Observations

- ❑ Automata presents 2 problem statements closely related to on-job tasks and uses **automatic program evaluation engine** to grade the written code.
- ❑ We find only **2.21%** engineers lie at the **level of A4**. These candidates show the ability to develop a logically correct algorithm for the given problem. These candidates are able to clear all the test cases and implement average-high time-space complexity and indentation styles. This is acceptable because these candidates have no or minimum industrial exposure. With **structured guidance, these candidates can develop fully functional codes** as per the corporate requirements.
- ❑ Only **2.56% engineers** show a level of A3. At this level, the code written has a few inadvertent errors which causes some test cases to fail. Such errors may occur due to incorrect implementation of advance functionality and partial data dependencies. There is a clear need for a much **better training curriculum for programming ability concepts** to understand how to develop optimized code.
- ❑ The coding capability of engineers need substantial improvement. **Given the high growth rate in jobs in software sector**, there is an urgent need of interventions to improve the programming skillset of engineers.

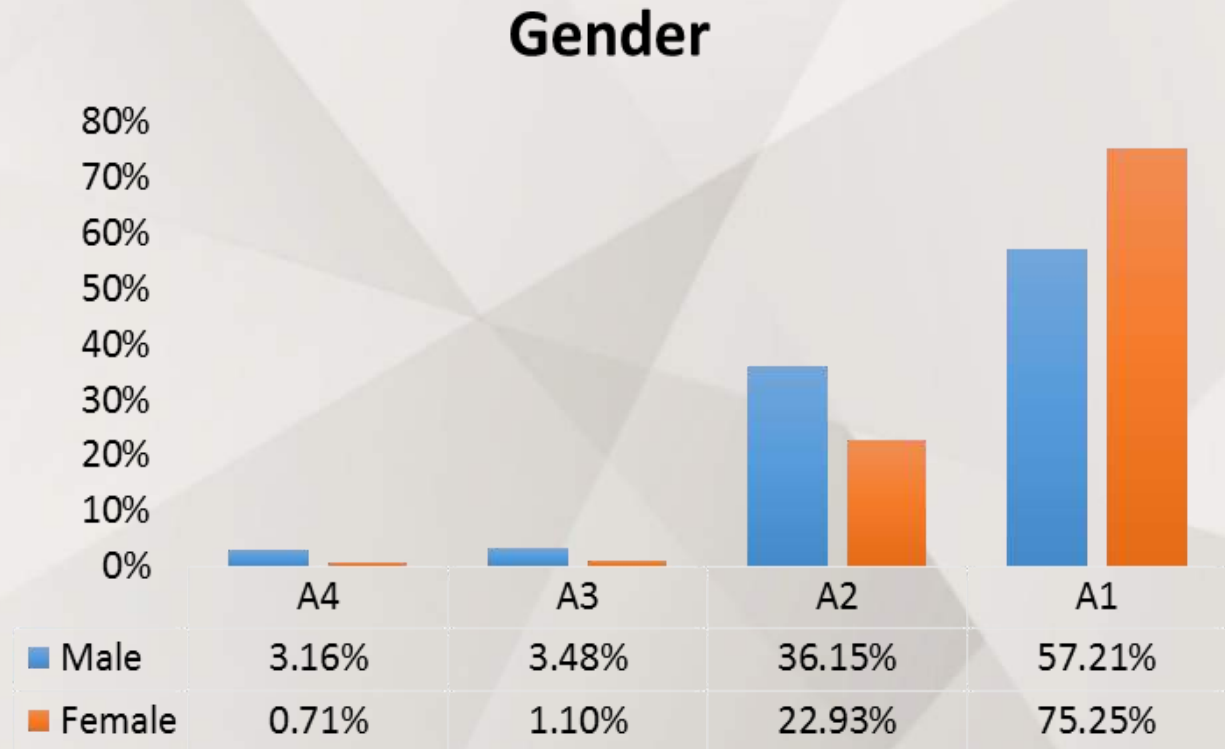
# Observations

- ❑ IT software companies care for how well candidates can understand the given problem and develop its algorithm **covering all use-cases possible** with best programming practices for the ease of scalability and debugging.
- ❑ This indicates that even though candidate are able to develop correct logic for the problem, they struggle to write a maintainable, efficient code with proper implementation of logic in a **time bound scenario**.
- ❑ We observe that the **maximum gap is in the Programming Ability and Programming Practices** of the candidates. **Only 9.21% and 15.63% candidates can apply machine learning and maintainability & usability principles**, respectively, that renders an ideal code.
- ❑ This warrants **a greater emphasis to programming skills** at the university level to impart better knowledge and broader thinking required to deploy real-time efficient codes.

# Programming Skill

## Gender Comparison

Programming Skill	Rubric	Gender	
		Male	Female
A4	Functionally and logically correct code	3.16%	0.71%
A3	Functionally correct code with few anomalies	3.48%	1.10%
A2	Functionally incorrect code	36.15%	22.93%
A1	Syntax Error	57.21%	75.25%



- ✓ The analysis unveils that males have better programming skills than females.
- ✓ Only 25% of females are able to write a compilable code and less than 1% can write logically & functionally correct code.



# Mean Scores

## Gender comparison

Gender	Mean score*			
	Programming Ability score	Programming Practices score	Runtime Complexity score**	Final score
Male	17.75	18.66	20.57	<b>15.14</b>
Female	8.20	9.00	13.00	<b>6.70</b>
Difference***	9.55	9.66	7.57	<b>8.44</b>

\*All scores in Automata modules are on a scale of 0 to 100

\*\*Complexity score distribution shown for those test takers who wrote a compilable code

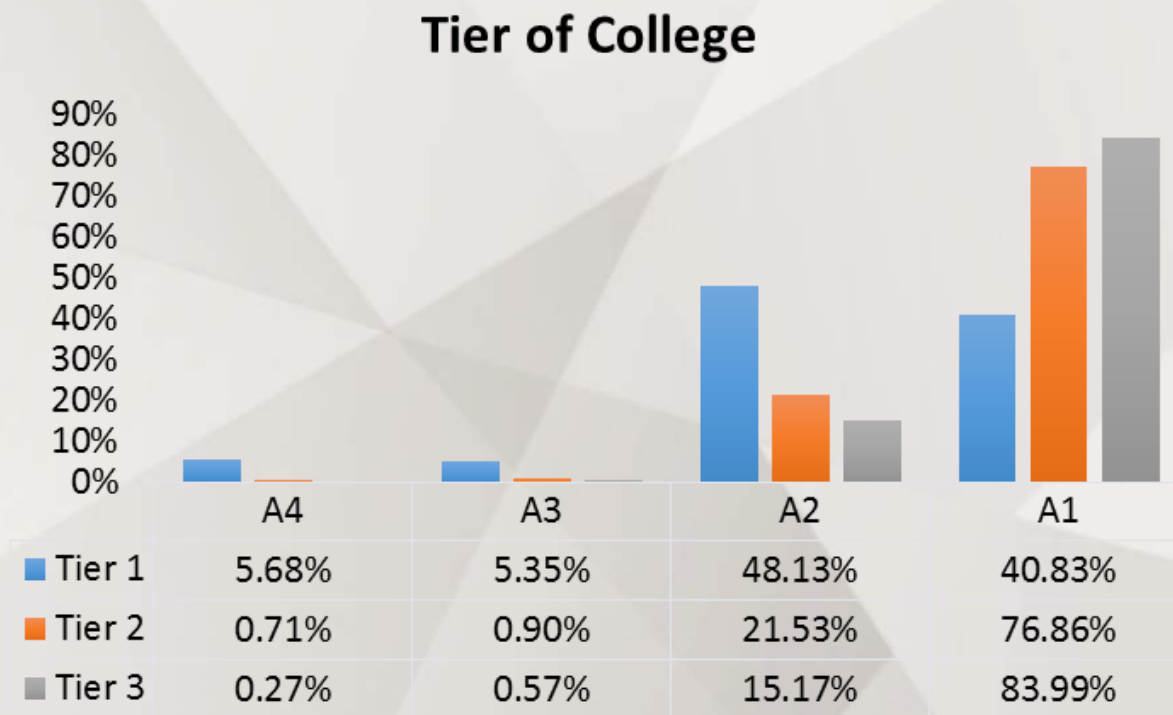
\*\*\*Difference = Male scores- Female scores

- ✓ Similar score difference is observed between males and females across all subsections.
- ✓ Maximum gap is observed in Programming Practices followed by Programming Ability subsection.
- ✓ In summary, females lack the skillset of logically correct code with reusable elements.

# Programming Skill

## Comparison by College Tier

Programming Skill	Rubric	College Tier		
		Tier 1	Tier 2	Tier 3
A4	Functionally and logically correct code	5.68%	0.71%	0.27%
A3	Functionally correct code with few anomalies	5.35%	0.90%	0.57%
A2	Functionally incorrect code	48.13%	21.53%	15.17%
A1	Syntax Error	40.83%	76.86%	83.99%



- ✓ The quality of programming skills is influenced by the tier of the college. As expected the coding ability of candidates becomes worse in lower tier colleges.
- ✓ More degradation is observed from tier 1 to tier 2 colleges as compared to that from tier 2 to tier 3 colleges.

# Mean Scores

## Comparison by College Tier

College Tier	Mean score*			
	Programming Ability score	Programming Practices score	Runtime Complexity score**	Final score
1	26.17	25.58	23.36	22.81
2	7.73	8.63	13.28	6.19
3	5.07	5.57	12.76	4.02
Diff Tier 1 to Tier 2	18.44	16.95	10.08	16.62
Diff Tier 2 to Tier 3	2.66	3.06	0.53	2.17

\*All scores in Automata modules are on a scale of 0 to 100

\*\*Complexity score distribution shown for those test takers who wrote a compilable code

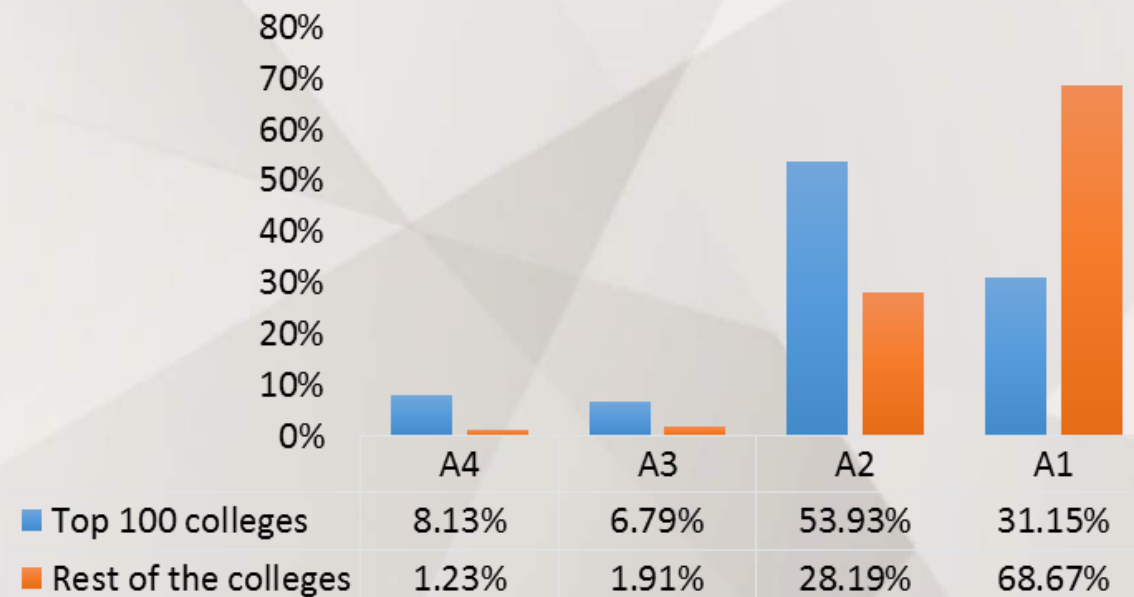
- ✓ Prominent score gap is observed in tier 1 and tier 2 colleges. This suggests training intervention is needed to improve programming skills in all aspects: logic, maintainability and efficiency.
- ✓ We find tier 2 and tier 3 colleges have comparable mean scores across all subsection where maximum gap is observed in subsection Programming Practices(code maintainability & reusability skills).
- ✓ In summary, candidates from tier 1 colleges dominate in programming skillset. And a tier 3 college candidate can be considered at par to a tier 2 college candidate.

# Programming Skills

## Comparison by Top 100 colleges vs Rest

Programming Skill	Rubric	College variance	
		Top 100 colleges	Rest of the colleges
A4	Functionally and logically correct code	8.13%	1.23%
A3	Functionally correct code with few anomalies	6.79%	1.91%
A2	Functionally incorrect code	53.93%	28.19%
A1	Syntax Error	31.15%	68.67%

Top 100 colleges vs rest



- ✓ The study shows that candidates from top 100 colleges have high proficiency of programming skills than those from remaining colleges.
- ✓ 31% candidates from top 100 colleges are not able to write a compilable code whereas from rest of the colleges only 31% are able to write compilable code.

# Mean Scores

## Comparison by Top 100 colleges vs Rest

Colleges	Mean score*			
	Programming Ability score	Programming Practices score	Runtime Complexity score**	Final score
Top 100 colleges	32.39	31.43	26.39	28.59
Rest of the colleges	11.31	12.55	15.34	9.31
Difference***	21.08	18.87	11.05	19.27

\*All scores in Automata modules are on a scale of 0 to 100

\*\*Complexity score distribution shown for those test takers who wrote a compilable code

\*\*\*Difference = Top100 campuses – rest of the campuses

- ✓ The score trend matches the general perception that candidates from top 100 colleges generally possess superior programming skills than any other college.
- ✓ As observed previously, Programming Ability is the evident differentiating subsection.

Thank You!





# Guide to Planning a No Boys Allowed/No Girls Allowed “Non-Trad” Event

This project, facilitated by Don Kirkwood, was made possible by a federal Perkins grant awarded to the Mid-Willamette Education Consortium designed to increase the number of students participating in CTE programs of study that are nontraditional for their gender.



# Table of Contents

05	<b>Introduction</b>
06	<b>History</b>
07	What's Non-Trad?
09	Equity Issue
10	Why Care?
11	So What Now?
12	NBA Event at NSHS
14	Grant Narrative & Deliverables
15	Regional Plan
16	<b>Planning and Implementing a NBA/NGA Event</b>
17	The Five Key Areas
18	Advertising
19	Financial Needs
20	Teaching
21	Technical details
22	Getting the 8th Graders into Your STEM Classes
23	Setting up a Budget
24	Phase 1
25	Phase 2
26	Phase 3
27	Outcomes
28	Lessons Learned
30	<b>Helpful Resources</b>
30	Action Plan
32	Letter to Feeder Middle Schools
34	Permission Slip
35	Letter Requesting Donations
36	Thank You for Donations
37	Sample Press Release
38	Examples of Marketing
39	Posters and Signs
40	<b>Non-Trad Data from NSHS</b>

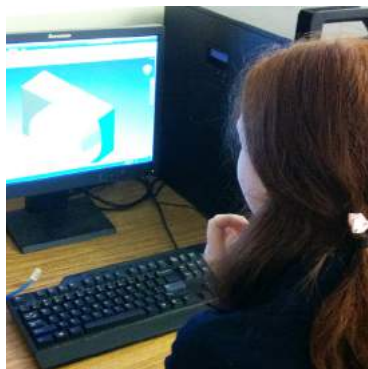


# Introduction

The primary purpose of this project was to describe the history and purpose of the NBA (No Boys Allowed) Conference at North Salem High School and then extrapolate it to be a viable option for other schools throughout the MWEC region. A focused outcome is that through North Salem's nine years of NBA experience, other schools, or groups of schools, are able to learn from NSHS and even avoid some time consuming mistakes. Before this planning guide dives into specifics, it seems important to look at a bit of history and explain why creating equity in all CTE areas, both for our students and schools, is vital for the future of our programs.



# History



## What is “Non-Trad”?

The term Nontraditional Careers (non-trad) refers to jobs that have been traditionally filled by one gender. The US Department of Labor defines Nontraditional Occupations as occupations for which individuals from one gender comprise less than 25% of the individuals employed in each such occupation. (<http://fightthetype.org/index.html>) Typically examples that are given for non-trad are “girls in engineering” and “boys in nursing”.

The major issues related to success in pursuing nontraditional careers (<http://www.cde.ca.gov/ci/ct/pk/nontrad.asp>) are:

1. Awareness of the need for equity in education for both men and women
2. Recruitment processes that provide adequate exposure and information
3. Training that assures equity in the classroom and addresses job retention
4. Placement after secondary and adult education that reflects the students' nontraditional career goals

This project focuses primarily on the second and third issues, and provides a template for other schools to follow to create similar events for their students.



## Equity Issue

A large number of CTE areas have problems with equity within the population of students they attract. For instance, in computer science, there are far too few young women involved (in 2010, young women took less than 15% of Computer Science AP exams, but in 1998 the number was 17%, so we are not moving in a positive direction), and the numbers in other areas of non-trad careers are also low.

In a non-trad occupation, women earn 20%-30% annually more than women in traditional employment. Over a lifetime women in non-trad occupations/fields will earn up to 150% more than women in traditional fields. High-demand and/or High-wage non-trad occupations for men typically include careers in Education, Health, and Family & Consumer Sciences. Many men find greater job satisfaction and/or better advancement opportunities in these careers that are non-trad for men.

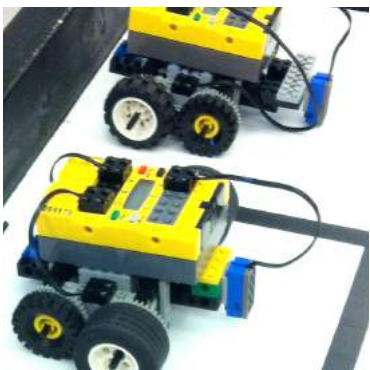
On the "Fight the Stereotype" website (<http://fightthetype.org/index.html>), we find what may be the root of the non-trad problem:

Stereotypes limit us.

They limit our children. When we reinforce, or indeed don't actively breakdown stereotypes, we close doors that could be the avenue to success and happiness for our children and students. In education, and the workforce, there are stereotypes – usually unspoken, but not always – about what jobs are appropriate for girls versus boys or men versus women. There are stereotypes about what jobs different minority or underrepresented groups are "good at" or are "not good at." There are "statistics" that reinforce stereotypes about graduation rates, abilities, interests, and economic necessities!

The reality is that the interests of one girl will surely differ from what interests another girl.

There will certainly be Hispanic girls who find their passion in the automotive industry while their best friend finds hers in accounting and finance! There will be African American men who love to work with young children while their peers are studying law and are baffled by anyone who relates to young children! The reality is unknown; however, what is known is that students "cannot maximize their human potential if their career aspirations are limited by stereotypes!"





## Why Care?

So, now that you have a better idea of what "non-trad" means you may be wondering why anyone should care about another problem (non-trad) being added to the pile considering all of the other issues that teachers confront on a daily basis. Well, there are several reasons as shared from the viewpoint of Don Kirkwood, the facilitator of this project:

All students, regardless of gender, need to be encouraged to get involved in non-trad courses so they can enjoy the salaries, job opportunities, satisfaction, or other aspects of our CTE area that we feel make it worth teaching and mastering.

As teachers (granted, this may be a more selfish reason!), we need to attract as many students as possible to our areas. As funding for public education continues to be a struggle, class size requirements are constantly increasing, and courses that cannot draw these larger numbers are cut. I know of several high quality computer science programs that have completely been hacked out of schools because the minimum "seats in seats" per course could not be met. CTE courses need to be able to justify their inclusion in our schools and reaching a more diverse population definitely helps in this domain.

Another seemingly purely selfish reason for having more students take our courses is that we really like teaching our subject matter and, in order to have our most advanced courses continue, we must have a pyramid with more student numbers at the beginning courses.

In the long run, an even more powerful reason can be argued for more diversity in our CTE courses. Math-In-CTE and other programs have shown that students actually do better in their core academic courses if they are motivated to learn the core concepts in their CTE courses where they can apply the knowledge as they learn it.

Administrators will face a far harder time slicing our courses if underrepresented populations start taking our courses and their math and/or English scores improve.

Finally, I believe that increased diversity is needed for an even more noble reason. As a nation, one of our primary strengths has been our diversity in ideas and backgrounds.

Compared to almost all of our current economic rivals our population is very heterogeneous. Therefore if we encourage and train all students (regardless of gender or other demographic) in CTE courses to understand how to approach and apply a variety of problem solving strategies, it will help us to constantly be ahead of the curve in developing and maintaining new ideas and solutions to the world's problems. So, by us working to figure out a solution to the lack of diversity in our courses, we can add to our nation's strength and character.

## So Now What?

So, if one buys into the fact that a problem exists in regards to students entering programs and careers that are nontraditional for their gender, and that we want and need to do something about it (without sacrificing a huge amount of time that doesn't exist) — what can an individual teacher or group of teachers do about it within their own CTE area(s)? That's what this guide is all about. There are many practical approaches that have been tried to increase diversity, and finding the one that works in an individualized environment is the key. There are special curricula (for instance, Project Lead the Way and the Curriculum for Agricultural Science Education), after school programs and extracurricular programs (FFA, FBLA, DECA, Boys and Girls Clubs, and Robotics Clubs to name a few) that some teachers have been able to use to help increase interest and participation in their courses.

The No Boys Allowed event at NSHS is another fairly simple and easily adaptable program that has been in place for nearly a decade, which seems to be not only creating more gender diversity in the NSHS STEM (Science, Technology, Engineering and Math) courses but, when other schools have been shrinking or eliminating their computer science offerings, NSHS has increased theirs (the statistics will be presented at the end of this guide).





# NBA Event at NSHS

The No Boys Allowed event at NSHS is just one possible solution to address the gender gap in CTE courses in a variety of STEM fields. North Salem High School is a fairly large (approximately 2,000 students), comprehensive high school in Salem, Oregon, but what they have developed can be scaled and replicated by a wide variety of other schools or regions of schools.

In today's society, many times perception of reality seems to be more important than actual reality. Unfortunately, since the technology bust of the late 90's, the public perception of this industry is that the majority of the jobs disappeared and that those that still exist have all moved overseas. This perception is invalid, but still hangs in the public's sight. The reality is that there are more IT jobs now than during the boom, and this number is projected to even increase at a higher rate in the near and long-term future. The result of this misperception is the consistent decrease in the number of students who are becoming involved in IT careers. Industry and government are so concerned that they are pumping out huge amounts of money and time to attempt to encourage more participation in these fields. Unfortunately, one very quick and efficient ways to fill all of the needed positions is not improving, but rather seems to be lagging even further behind and that is the lack of women in the IT arena.

Throughout the US, there is a huge disparity between the percentage of young women and men involved in technology courses; this is especially true in computer science, where less than 17% of the students taking the 2006 Advanced Placement Exam

in computer science were young women. There is a ton of research about why this disparity exists, but not enough is being done about this situation where the "rubber hits the road", with our schools.

During a panel discussion on gender equity issues at Oregon's 2004 Super Quest conference, inspiration struck two young women (Heather Hatch and Joy Schneider) from North Salem High School. Heather knew that North was attacking this gender difference on several fronts, but decided that we weren't doing so early enough; she determined that NSHS needed to focus not only on the high school but also the feeder schools; hence, the genesis of No Boys Allowed (NBA).

Heather and Joy decided that a conference needed to be set up for middle school girls to give them a taste of the exciting STEM opportunities available for them at North. They wrote grants, talked to administrators, visited classrooms, got teacher and student volunteers, and organized a daylong event for seventh and eighth grade girls – the first annual NBA conference. Since its inception in 2004, this workshop has occurred every year, just before eighth grade registration, and now several advanced STEM students can link their computer involvement directly to their participation in this event.

This guide will bring together what has been learned (both the good and the bad) at NSHS so that others can replicate, through their own unique variations, a version of our continuing NBA conference.



# Grant Narrative & Deliverables

For several years now the Mid-Willamette Education Consortium (MVEC) has helped support the No Boys Allowed (NBA) event at North Salem High School through a grant process provided for by the Oregon Department of Education and on a few occasions through MVEC funding only.

NBA is a highly successful middle school recruitment and retention model for girls based out of North Salem High School that focuses on Computer Science, Engineering, Robotics, and Wood Technology. It is facilitated by former North Salem High School teacher Don Kirkwood and his team of North Salem staff and student leaders. The number of female students in these STEM programs at NSHS is now above 30%. Research has shown that in the area of engineering, if students do not declare engineering as their major upon entry to college there is very little likelihood that they will choose it after beginning their college career. Recruitment at early stages seems to be the key to getting kids interested in these types of high technology programs of study.

The basic concept of NBA is a three phased approach and is implemented once a student leadership team is in place. The design facilitates the placement of student leaders and helpers into positions based on their interests and strengths. Most of the female students are former NBA participants and just as many male students are motivated by the concept, passion, and vision brought by NBA teaching staff and their fellow students. It is when a core leadership team is in place, made up mostly of these diverse students and key North teachers that the planning begins.

After nine annual NBA's this event has proven to increase the number of girls in Computer Science and provides retention well through high school and beyond. In just the last five years the rate of girls in technology programs of study at NSHS increased from 15% to just over 35% during the 2010-11 school year. In addition, the overall numbers of both male and females in the technology programs has doubled to over 300.

## Regional Plan

Using the same successful NBA model outlined previously, the MVEC plan is to develop a regional approach that can be replicated state-wide. Our focus this next school year is to provide a series of teacher/facilitator trainings, to produce materials, and to strengthen community college connections in two other areas of the region in order to duplicate a NBA-type event. Our two focus areas will be "girls in engineering and computer science" in Yamhill County (in collaboration with the Project Lead the Way based Evergreen STEM Institute at the Evergreen Space Museum) and "boys in nursing" in North Marion County. The goal will be to use the experience and expertise Don Kirkwood has gained over the past nine years to make the same vision a reality in more rural areas of the region. This is a "big picture" vision that lays the foundation for future nontraditional program of study growth across our region and potentially the state. Not only will we implement a strategy to increase our nontraditional percentages for our region (since we did not meet the performance indicator for Perkins IV in 2009-10), but we will increase recruiting and retention rates at both the high school and college levels as students learn what is available for them past high school in their chosen program of study.



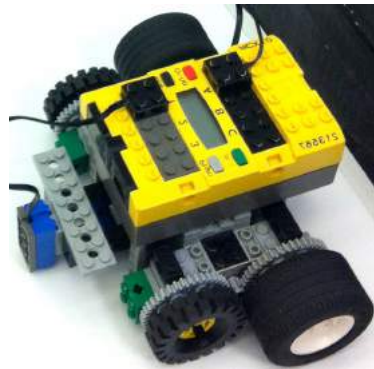
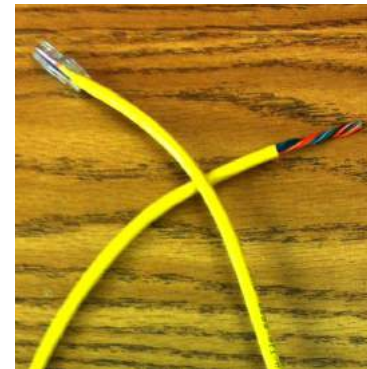


## The Five Key Areas

There are five areas that must be addressed in order to make a NBA/NGA event a reality:

- Advertising
- Financial needs
- Teaching
- Technical Details
- Actual 8th Grade Recruitment

Planning and  
Implementing a  
NBA/NGA Event





# Advertising

## Posters

This will vary with programs and student lead creativity.

## Video

If you have a video production class or creative students, let them interview young women in tech classes or fields, take clips of tech events (robotics competitions, programming competitions, electric cars, ...) and compile a video to show at middle schools. Again, this can be adapted to meet a specific programs needs.

## Personal visits – “flash and dash”:

Develop a 10 to 15 minute sampler of STEM topics related to the program(s) the girls will learn about (for instance, a robotics demo, 3-D CAD samples, and computer gaming — preferably created by students). Once the presentation is prepared, schedule a team of high school students to go to middle schools and give the presentation to groups of students. At the conclusion of these events, have students get the names and contact information of girls who are interested in attending the event. Remember the hook, remind them of the great prizes, food and free t-shirts at the event.



# Financial Needs

## Door prizes

These are a key attraction for students. Many students have commented that the only reason they originally signed up was for the chance of winning a mini-laptop computer. Look for donations for this, as the public funds or grants may not be able to be used for this purpose.

## Building/Facility

Need 3 to 4 topic specific rooms to work in and meet for workshops and lunch

## Lunch/Food

Pizza and soft drinks work really well!  
You definitely need to feed your participants and volunteers

## T-shirts

If financially feasible, this really adds to the excitement and sense of community

## Potential Funding Sources

Grants: Northwest Girls Collaborative, Perkins  
District and school fundraisers  
Donations: former students, parents of present students, businesses ...





# Teaching

## Make presentations exciting

*Important note: This is the only place teachers have to do work for the event. It is best to have instructors teach sessions so students make a personal connection with them.*

## Topics need to be complete within themselves, for instance:

Computer programming: use Alice or QBASIC graphics

3-D CAD: Rhino

Building a simple box made in CAD session

Making a networking cable and playing simple games with peer-to-peer

Simple robotics task – programming a robot

Hardware maintenance

Adaptations: Other CTE areas can do any hands on activity of interest that they come up with that will fit within the time frame



# Technical details

**Parent permission slips for students to attend and for picture/video release**

**Getting a middle school teacher to take ownership**

**T-shirt design**

**Ordering:**

Food and drinks

T-shirts (*Important note: Don't forget to look at your own or other schools for t-shirt printing; McNary High School does a phenomenal job for us, and it's a good way to share the project with other CTE programs.*)

Door prizes

Any needed consumables for projects

Name tags, other needed supplies

Printing of agenda, other information

**Reserve building/facility:**

Make sure the alarms are off!, ensure there is janitorial support

**Supervision:**

Make sure you have enough volunteers to provide adequate supervision

**Thank you notes**

**Scheduling:**

For the day of the event

**Flash and dash:**

Develop and implement

**Actual day:**

Make sure to have a solid "plan of attack" in place





# Getting the 8th Graders into Your STEM Classes

**Scheduling/course selection process:**

Understand how it works

**Timeline:**

Know when students register for classes—work backwards to set up timetable for entire event

**During actual sign-up:**

Be able to explain the difference in your CTE classes versus "normal" classes: hands-on, more critical thinking, less or a different kind of homework, etc.

Share scholarship possibilities for students in your CTE area

Provide labor market and career opportunities in your field/similar fields, including average salaries

**Help them to see how meaningful the career is to society and could be for them**

## Setting up a Budget

The following is an example of what a budget might look like for a NBA/NGA event. It can be modified based on what funding you have available, but will at least serve as a guideline. *Note: Budgeting will vary based on total number of students participating.*

Supplies (consumables, robot kits, etc.)	\$1,000
Door prizes	\$1,000
Food	\$250
T-shirts	\$450
Staff stipends??? (only if necessary)	\$800
Facility/Janitorial (only if necessary, often no costs are incurred)	\$500
Total	\$4,000

*\*The event at NSHS takes place on a district non-student day, so that the school facility is available, the kids don't miss class time, and there is no cost for substitutes for the teachers.*





# Phase 1

Called "Flash and Dash" this phase involves student leaders going to area middle schools and presenting a brief DVD (see enclosed NBA 2010-11) on the highlights of the latest NBA event with student leaders following up with their own passionate accounts of the fun and personal enrichment. At the conclusion of the presentation they take sign-ups from 7th and 8th grade girls for the upcoming event.

# Phase 2

This is the actual "NBA" event and during this day middle school girls are invited to come and participate in a variety of high energy tech@north workshops. Topics covered are computer networking (the girls make network cables and come to understand how computers can communicate between themselves), CAD (the girls design 3-D pictures and print them out), robotics (the girls program and manipulate robots), and computer programming (the girls write code to create pictures and even animation). Each participant receives a t-shirt designed by the NBA leadership team and a chance to win prizes, including computers and other technology. Everyone is pulled together at the conclusion of the workshops for a pizza party as they listen to a former NBA alum that has been successful in the field of computer technology or engineering.

For other schools or groups of schools interested in implementing a similar program: Look at the programs in your school/region and design a program to support recruitment for them.

If you have a unique STEM opportunity in your region, you may wish to recruit students for "nontraditional" learning opportunities such as the Evergreen STEM Institute ([www.chemeketa.edu/mwec/evergreen](http://www.chemeketa.edu/mwec/evergreen)) during your event as well.

The key here is to make this model work for your unique program(s) that are non-trad for one gender or another.





## Phase 3

The final stage is "registering" middle school 8th grade girls and is essential in the follow-up for technology courses at North Salem. This involves teachers and student leaders from the NBA program that go to the same area middle schools and help former NBA participants decide to register for technology-related classes within a program of study (POS).



## Outcomes

Hopefully you have an idea of how powerful a NBA/NGA conference can be for student recruitment into non-trad fields. Below are some of the positives to be highlighted:

- Eighth grade girls are motivated to get involved with STEM
- High school students will get practice presenting to and assisting others
- Two high school young women are the organizers and leaders of this conference, and many other students learn valuable project-management skills
- Staff develop positive relationships with incoming students
- Other schools have sent representatives to see how this conference works and how to replicate it





## Lessons Learned

Here are just a few nuggets of advice from Don Kirkwood:

The more students that are in charge of this event, the more successful it will be – not necessarily easier to facilitate however

There are several approaches to organizing students. At times, I have had very structured, independent groups who organize and almost run the event themselves – there are major benefits to this, actually getting things done on time! One approach these groups take care of is an Action Plan (see the example contained within this guide).

With other groups, a general outline is enough; but through personal experience, it is very handy to give each student a copy of their assignment with specific details and dates attached. Also it is handy to have students either send all material to you as an attachment with an e-mail and/or make sure they Cc you whenever they e-mail each other or others about the project.

I hope that this guide and the following resources are helpful. I know that NBA made a radical difference with our computer science courses at North Salem High. If you have any other questions, please feel free to e-mail me at [kirkwood201@comcast.net](mailto:kirkwood201@comcast.net).



# Helpful Resources

## Action Plan

Team Members:		Reports to:		
<b>GOAL: To plan and organize NBA and for it to be successful.</b>				
Steps/Tasks	Person Assigned to Task	Materials or Resources Needed	Deadline	Date Completed
Talk to Office Manager about facility usage on desired date				
Evaluate and pursue funding sources: -Grants (write letters, make calls, reach out to agencies) -Perkins funding -Look for donations from industry, parents, and graduates of your program				
Set up the event budget (t-shirts, supplies, janitorial, promotion, food, door prizes, etc.)				
Create a schedule, working backward from when 8th graders register for high school				
Determine the "when, where, who, and how" for all aspects of the timeline				
Decide who is going to speak/present and the format for the actual NBA event				
Day of event agenda: decide when, where, who, how				
Create marketing and recruitment publications: -Flyers -Signup sheets -Signage for the event -T-shirt design				
Talk to the high school teachers from all programs you are interested in to determine their involvement				
Create "Flash and Dash" Presentation				
Communicate with middle school teachers to allow 10-15 min presentations to be given to their classes				
Determine if there are other viable recruitment methods				
Set up appointments with the middle school teachers				
Plan attendance at other events that may provide good recruitment opportunities				
Purchase supplies and other budget items				
Get t-shirts printed				
Order the food for the event				
Ensure that you have a "plan of attack" together for the day of the event				
Work with students to get them registered for high school CTE STEM classes (this will vary based on the process in place and number of schools involved)				



# Letter to Feeder Middle Schools

Here are two examples of letters that were used in the past by NSHS:

## Letter #1, more generic letter, not as personal

To whom it may concern,

On February 25, we are having our annual No Boys Allowed (NBA) Conference at North Salem High School (NSHS). This conference is designed to introduce technology concepts to eighth grade girls. During the conference, staff and students of NSHS will demonstrate and teach topics on networking, programming, drafting, and PC constructing in four workshops. If you are not familiar with this conference, please contact Don Kirkwood at [kirkwood\\_don@salkeiz.k12.or.us](mailto:kirkwood_don@salkeiz.k12.or.us) (503) 399-3241, for more information. Currently, students are working to increase the number of participants in this conference and they need your help. Students from the tech@north academy want to coordinate an event where they will be able to come to your school and present information regarding the NBA Conference to your math, science, or computer class(es). These tremendous opportunities will allow girls to explore topics that are not the norm in typical classroom settings. Our team of students is hoping to have 40 girls at the NBA Conference this year. Please allow them this opportunity to present information to your class. If you would like to welcome these students to your classroom, please contact [put contact info here].

## Letter #2, more personal letter from a student to a middle school teacher

Hello,

My name is \_\_\_\_\_ and I am a senior at North Salem High School. Mrs. Ryan gave me your name as a teacher who might be interested in the following idea.

My friend, \_\_\_\_\_, and I are involved in tech@north, an academy inside North that allows the students to learn about many areas of technology including: CAD, Programming, Networking, Robotics, Hardware, and Engineering Tech. This academy also allows students to receive college credit, scholarships, and jobs.

Unfortunately, in all areas of technology, women are highly underrepresented. Although North has more young women involved than most schools, we really want to generate more enthusiasm among this population. In order to help reach this goal we are holding a Technology Workshop for the 8th grade girls from all of North's feeder schools. This will be an all-day event on February 1st from 9:00am to 3:00pm at North Salem High School focusing on hardware, networking, programming, CAD, and robotics.

To reach this audience, we need to demonstrate some of the cool, hands on activities that relate to these areas. To accomplish this we would like to come and visit your Algebra classes with a "flash and dash" demonstration. This presentation will take 10 to 15 minutes and, we hope, will encourage all students to work harder throughout the end of the year. Beyond this, when we leave, we hope to have several girls sign up for our Technology Workshop.

If in the next week or so this works for you please call any time at (503)399-3241 and ask to speak to or leave a message with Don Kirkwood, or you can e-mail him on GroupWise. Thank you for your time and consideration. We look forward to hearing from you.





Permission Slip

Here is an example of the permission slip used at NSHS. Make sure to get yours approved by your administration before using it!

I, \_\_\_\_\_, authorize my daughter to attend the No Boys Allowed (NBA) computer conference at North Salem High on the April 23rd. NBA will be held at North from 9:45 – 2:00. I also give permission for pictures or videos to be taken of my daughter; I understand that the filming and photographing of my child will only be used for educational purposes at the discretion of North staff.

\_\_\_\_\_  
Student Name

\_\_\_\_\_  
Student ID Number

\_\_\_\_\_  
Parent or Guardian Signature

\_\_\_\_\_  
Date

Student Sponsor: \_\_\_\_\_

*(Extra door prize tickets will be provided to students who encourage participation.)*

Letter Requesting Donations

Here is an example of a letter used by NSHS to request donations for NBA:

Ms \_\_\_\_\_,  
My name is \_\_\_\_\_ and I am a senior at North Salem High School. As a senior, I am required to complete a senior paper and project. Most of the students do the easiest or fastest project that they can. However, my friend, \_\_\_\_\_, and I saw this project as an opportunity to educate young girls in the area of technology.  
\_\_\_\_ and I are part of the tech@north programs offered at North. Since we have been in the program, we have seen a rise in the overall number of students taking STEM classes and in the percentage of girls in these computer programming, networking and hardware classes. Even though there are seven girls in our AP Computer Science Java class, and this is more than most schools in the nation, it should be far higher. After research and being involved on the Super Quest panel discussion on gender equity, we decided that a critical age to attract young women in technology is middle school. Therefore, \_\_\_\_ and I have decided to hold a Saturday workshop covering a wide variety of computer topics for the middle school girls. The topics will include Robotics, Computer Programming, Networking, Hardware, and Computer Aided Drafting. We hope to inspire them so that they can continue with computer science training just as \_\_\_\_ and I have.

In order for this event to occur, we need financial assistance. We have already received a mini-grant from our high school and are working at several other opportunities. After working on the panel with you last summer at the Oregon Super Quest conference, we are hoping that you would be excited to help us reach our goal of encouraging the young women from our feeder schools – a very high percentage of which are also from underrepresented populations.

We fully appreciate your time and consideration. If you wish to contact us, call Don Kirkwood at (503)399-3241. Thank you.





# Thank You for Donations

Here is an example of a thank you letter used by NSHS.

Dear \_\_\_\_\_ and Symantec Committee,

I want to formally thank you for your generous donation of \$4,000 for our 2006 Salem-Keizer Public Schools Technology Conference. Your generosity provided extra incentive for a wider variety of students to attend these workshops, and giving away door prizes to one out of every ten participants really created a buzz.

What is appreciated, even more, is your willingness to share with a school district a distance away from your worksite. Unfortunately, Salem-Keizer Public Schools are located between high-tech belts of Portland and Eugene and so there is a dearth of local business willing to support tech-education. Even with this lack of local support, many Salem-Keizer schools are excelling at reaching our students. At North Salem High, we teach networking (through Cisco Certification), hardware (many paid interns running help desks around town) and Advanced Placement Computer Science; therefore, events, such as Tech Fair and our No Boys Allowed Conference, allow many of our students to actually teach workshops and/or explore advanced topics that are not necessarily covered in classes. These conferences also encourage participation by a wider diversity of students (young women and students with diverse socio-economic and racial backgrounds) than most of our classes contain, so we are working toward a more appropriate mix of students trained in technology

Once again, thanks for your assistance – without your contributions the number of participants and excitement at the event would have been diminished.

## Sample Press Release

Below is an example of a summary of the 2009 NBA event that was used to get the word out after the event.

2009 NBA

While the need for engineers and computer scientists continue to grow, the numbers produced, across all levels of education, have shrunk. Fortunately, because of the generosity of those who have donated to North Salem High's gender equity program, we are fighting this trend. From the inception of this program, not only have the number of young women taking computer science courses at North more than quadrupled, the number of guys has doubled (see charts at bottom). The only new tool in our program has been the continued effect of North's "No Boys Allowed" (NBA) Tech Conference. This conference, for young women from our feeder elementary schools, was created by two North students (Heather Hatch and Joy Schneider) six years ago and continues to be planned and implemented by present North students. This year's conference, attended by 76 students, contained workshops dealing with programming, CAD, robotics and manufacturing (voluntarily taught by North teachers) along with a pizza lunch, t-shirts, guest speaker (Ashley Fisher, a former North student who attended the first NBA conference when she was in eighth grade) and door prizes. All of the funding was provided by this grant and donations from Best Buy.

We do want to thank those who gave us this grant and the donations, because without your assistance, this program would not exist! The money you provide goes directly to the students and has a direct impact on their and our own future.



Here is an example of a letter for a student paper or parent newsletter:

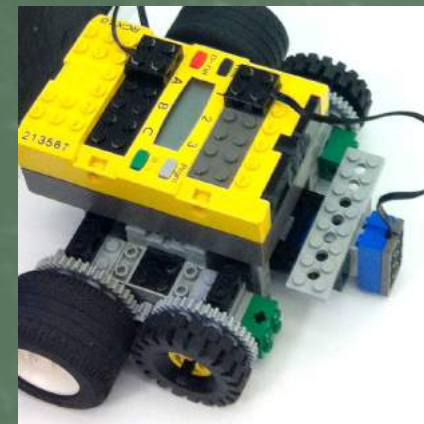
#### No Boys Allowed Conference

North has continued a tradition where we encourage young women to get involved with technology. This year's 2nd annual NBA Conference occurred on a Saturday where middle school girls were invited to come and participate in a variety of tech@north workshops. Topics covered were as far ranging as computer hardware (the girls took computers apart and rebuilt them), CAD (the girls design 3-D pictures and printed them out) and computer programming (the girls designed graphics programs). Beyond these activities, the girls participated in a warm-up led by Business Academy member Maria Rosas, devoured pizza for lunch, received free t-shirts and had a chance at winning several door prizes, including a computer. The conference was a phenomenal success, largely due to the efforts of the volunteer teachers: \_\_\_\_\_; a teacher from Houck, \_\_\_\_\_, who took charge in getting a large group of girls motivated to come; \_\_\_\_\_, who organized the event, a multitude of North students who volunteered to assist and even teach classes; and our Vice-Principal, \_\_\_\_\_, who supported us with all of the district details. The event was tremendous success and we plan on continuing this conference every year – so get INVOLVED and have some fun.

## Examples of Marketing

Posters and Signs

# NBA Conference (No Boys Allowed)



Door Prizes: Computers, photo-quality  
printers and other great prizes  
Free Lunch & T-Shirt

Where: North Salem High School  
When: 1/30/2011  
Time: 9:45 to 2:00 PM

Learn how much fun technology is by actually programming graphics, doing  
networking tasks, programing and operating a robot, and creating a 3-D drawing!!

Contact person: Don Kirkwood (503)399-3241

# Data from NSHS Computer Science Students

North Salem High (Young women/young men)

## 2011-12

Programming:	29/113 → 25.6%
Engineering	10/34 → 29.4%
Robotics	8/74 → 10.8%
Networking	6/35 → 17%

## 2008-9:

CS I:	21/49	
CS II:	15/45	
C++:	12/34	Total: 63/173
Java:	15/45	36.4%

## 2010-11

CS I:	21/62	
CS II:	19/55	
C++:	11/45	Total: 66/ 228
Java:	15/66	28.9%
Intro:	8/28	
Networking:	7/50	Total: 15/78
		19%

## 2007-8:

CS I:	15/40	
CS II:	11/30	Total: 35/115
C++:	3/19	30.4%
Java:	6/26	

## 2006-7

CS I:	5/34	
CS II:	5/26	Total: 21/139
C++:	6/40	15.1%
Java:	5/39	

## 2009-10

CS I:	17/54	
CS II:	14/50	
C++:	9/48	Total: 51/ 214
Java:	11/62	23.8%
Intro:	5/24	
Networking:	5/55	Total: 11/80
Hardware:	1/11	

## 2005-6:

CS I:	8/25	
CS II:	6/22	Total: 17/87
C++:	1/20	19.5%
Java:	2/20	

## 2004-5:

CS I:	5/20	
CS II:	4/20	13/88
C++:	2/24	
Java:	2/24	

From the Portland Business Journal:

<http://www.bizjournals.com/portland/blog/techflash/2016/02/new-portland-jobs-board-pairs-women-with-tech-jobs.html>

## New Portland jobs board pairs women with tech jobs

Feb 10, 2016, 1:25pm PST Updated: Feb 11, 2016, 9:29am PST

Kathryn Brown's experience as a woman in the tech industry has led her to her latest venture, Scout Savvy.

Her aim? Make it the go-to place for Portland area tech firms to find talented technical employees who happen to be female.

Scout Savvy is a hiring tool designed to connect technical women with companies that value gender diversity, offering a marketplace for job seekers and employers. It is free for job seekers to post resumes to the site. Companies will be charged to post job openings.

Eventually, there will also be educational videos and other content to help job seekers brush up on soft skills such as salary negotiations or navigating an all-male development team.

"My grand vision is to create an end-to-end solution that gives women the training to get hired at a tech company that values gender diversity," Brown said.

The training element is still a work in progress, but the site is live with 30 resumes and 25 jobs posted from eight different companies.

Jobs posted on the site range from a front end developer at music video platform Vadio to a build engineer at Jama Software and software engineer at Esri.

To get the business off the ground, Brown is starting by targeting the two dozen Portland companies that have signed on to the Portland Diversity Pledge as well as organizations such as Women Who Code Portland and PDX Women in Tech.

"The inspiration for the model was a conversation with hiring managers that are looking for more women in the hiring pipeline but they get one female resume for every 20 guys. And they don't have the time and bandwidth to get to all the meetups," she said. "I go to the meetups and the view in the community is 'we are here, why can't you see us?'"

With Scout Savvy she wants to bridge that visibility gap.

Brown has built the site herself and has one angel investor. She plans to raise a seed round later this year and build out a team. She wanted to get an early version of the tool in the market ahead of that.



FOTOSNAP, FOTOSNAP.CO

Kathryn Brown, founder of Scout Savvy



"One of the first phases in dealing with diversity is talking about it and raising awareness," she said. "I think people are ready to move to action."

Brown has found validation not only from her market research but also from some national competition in related areas. New York-based PowerToFly has raised \$7.5 million from investors and landed big-name clients as it matches technical women to remote jobs. Plus, there is Jopwell, which just raised \$3.2 million to match minority candidates to tech jobs.

"For me, (competition) gives me promise. It means the market is ready and the time is now," she said. "People want a solution and they want to do something about it."

Brown started in tech working for TechStars alum DailyBurn, which was eventually sold to IAC. She came to Portland and worked at ShopIgniter on the client services team before attending code school Epicodus. She then worked as a junior developer for DevelopmentNow.

"The product design of Scout Savvy is parallel to my experience in tech, which I think is common," she said of her nontraditional computer science education.

If she can make it work in Portland, Brown hopes to take the platform national.

**Malia Spencer**

Staff Reporter

*Portland Business Journal*



*"Emails are the best way to  
communicate with our customers."*

- MATT JUSZCAK, Co-owner, Turnstyle Cycle





National Science Foundation  
WHERE DISCOVERIES BEGIN



HOME RESEARCH AREAS FUNDING AWARDS DOCUMENT LIBRARY NEWS ABOUT NSF

## Awards

[Search Awards](#)[Recent Awards](#)[Presidential and Honorary Awards](#)[About Awards](#)

### How to Manage Your Award

[Grant Policy Manual](#)[Grant General Conditions](#)[Cooperative Agreement Conditions](#)[Special Conditions](#)[Federal Demonstration Partnership](#)[Policy Office Website](#)

### Award Abstract #1643624

## Mentoring in Manufacturing Technology

NSF Org:	<a href="#">DUE</a> <a href="#">Division Of Undergraduate Education</a>
Initial Amendment Date:	November 9, 2016
Latest Amendment Date:	November 9, 2016
Award Number:	1643624
Award Instrument:	Standard Grant
Program Manager:	Elizabeth Teles DUE Division Of Undergraduate Education EHR Direct For Education and Human Resources
Start Date:	December 1, 2016
End Date:	November 30, 2021 (Estimated)
Awarded Amount to Date:	\$879,337.00
Investigator(s):	Dorina Cornea-Hasegan dcorneah@pcc.edu (Principal Investigator) Gayathridevi Iyer (Co-Principal Investigator) Aaron Scher (Co-Principal Investigator)
Sponsor:	Portland Community College 12000 SW 49th Avenue Portland, OR 97219-7132 (971)722-8392
NSF Program(s):	S-STEM:SCHLR SCI TECH ENG&MATH
Program Reference Code(s):	9178, SMET
Program Element Code(s):	1536

### ABSTRACT

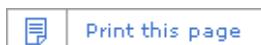
This project at the Rock Creek campus of Portland Community College (PCC) in Oregon, entitled Mentoring in Manufacturing Technology (MeMT), is designed to address the important national issue of increasing educational opportunities for lowincome, academically talented science, technology engineering, and mathematics (STEM) students by providing scholarships and strong curricular and co-curricular support. The project will focus on recruitment and retention strategies that have proven successful in increasing the number of females and underrepresented minorities in STEM careers and will add to the knowledge base of what works in recruitment and retention strategies, for whom, and in what circumstances. In addition, the project will research the extent to which embedding mathematical strategies into targeted gateway courses enables students to better understand the engineering mathematics in later engineering technology courses and



programs and the effectiveness of a formal mentoring program upon retention of scholars to graduation. The project has two connecting strategies for broadening impact: 1) to evaluate the effectiveness of activities that lower barriers to participation for females and other underrepresented students in STEM fields, and 2) to implement and sustain evidence-based practices that have an impact on recruitment, retention and degree completion of underrepresented groups in STEM fields and to share the practices that had the greatest impact and would benefit other institutions.

A total of 80 one-year scholarships will be awarded to students enrolled in Microelectronics Technology, Solar Voltaic Manufacturing Technology, and Automated Manufacturing Technology, and eight one-year scholarships for scholars transferring to Oregon Institute of Technology seeking a baccalaureate degree in Electronics Engineering Technology, Electrical Engineering, and Manufacturing Engineering Technology. The overall objectives of the MeMT program are to 1) increase the percentage of females enrolled in targeted engineering technology programs from 18% to 25% over five years; 2) increase the percentage of minorities enrolled in targeted engineering technology programs from 25% to 35% over five years; 3) retain 90% of scholars to completion of an associate degree; 4) ensure that 90% of graduating scholars will be employed in a position related to their degree/major or enrolled at Oregon Institute of Technology; and 5) increase the retention rate of students in targeted entry-level courses. The MeMT project will implement and test a student mentoring program based on scholar, faculty and alumni/industry participation that is being adapted from materials developed by the University of Maryland, Baltimore County Center for their Women in Technology program along with the ENGAGE Faculty-Student Interactions. A STEM Camp and two STEM workshops each year will be offered and will be open to high school seniors, with marketing and recruitment focusing on minorities and women. A cohort building structure will be put into place where scholars will be scheduled within the same classes where possible. One-on-one intrusive academic advising will be required for scholars, as will small-group and individual tutoring for those who need additional assistance. NSF-funded initiatives that include the Institute for Women in Trades, Technology, and Science (IWITTS) and ENGAGE Engineering will be adapted to assist in recruiting and retaining females and underrepresented minorities into the three targeted programs. Faculty members will receive training for incorporating these strategies into activities and curriculum. Everyday Examples in Engineering, Spatial Visualization Skills, and concept based formulas, graphs, and other representations will be incorporated into classes that prepare students to solve mathematics problems in gateway engineering courses.

Please report errors in award information by writing to: [awardsearch@nsf.gov](mailto:awardsearch@nsf.gov).

[↑ Top](#)[RESEARCH AREAS](#)[FUNDING](#)[AWARDS](#)[DOCUMENT LIBRARY](#)[NEWS](#)[ABOUT NSF](#)

[Website Policies](#) | [Budget and Performance](#) | [Inspector General](#) | [Privacy](#) | [FOIA](#) | [No FEAR Act](#) | [USA.gov](#)  
[Accessibility](#) | [Plain Language](#) | [Contact](#)



National Science Foundation, 4201 Wilson Boulevard, Arlington, Virginia 22230, USA  
Tel: (703) 292-5111, FIRS: (800) 877-8339 | TDD: (800) 281-8749

[Text Only Version](#)

► **The Oregon Administrative Rules contain OARs filed through January 15, 2017** ◄

**QUESTIONS ABOUT THE CONTENT OR MEANING OF THIS AGENCY'S RULES?**  
**CLICK HERE TO ACCESS RULES COORDINATOR CONTACT INFORMATION**

## **OREGON BUSINESS DEVELOPMENT DEPARTMENT**

### **DIVISION 70**

#### **FIRST SOURCE HIRING AGREEMENTS**

##### **General**

#### **123-070-1000**

##### **Purpose and Scope**

(1) The purpose of this division of administrative rules is to implement ORS 461.740, under which business firms are required to enter into a First Source Agreement if benefiting from funds derived from the Oregon State Lottery through certain economic or community development programs, as determined by the Oregon Business Development Department.

(2) Provisions of this division of administrative rules also apply to businesses benefiting under the following tax incentive programs, as provided by the relevant statutes:

(a) The "Strategic Investment Program" under ORS 285C.600 to 285C.626 and 307.123, as specified in OAR 123-623; and

(b) The standard exemption in "enterprise zones" under ORS 285C.050 to 285C.250, as specified in OAR 123-674.

(3) Requiring Benefited Businesses to enter into a First Source Agreement is intended to help individuals, who are already receiving job training and assistance supported by public funds, by linking these individuals with private sector employment opportunities of businesses that:

(a) Will be hiring in association with the receipt of public benefits; and

(b) Should make a good faith effort to hire and retain such individuals, who are presumed to have low incomes or otherwise face disadvantages in finding employment.

(4) First Source Agreements and this division of administrative rules are not intended to do the following:

(a) Guarantee employment for any such individual;

(b) Dictate the actual hiring by a Benefited Business; or

(c) Necessarily accomplish other public or social objectives associated with employment opportunities.

(5) As used in ORS 461.740(1), "good faith effort to hire and retain as employees low-income individuals who have received job training assistance from publicly funded job training providers" means the Benefited Business will reasonably honor the terms of the First Source Agreement entered into with the Contact Agency for local Providers.

Stat. Auth.: ORS 285A.075, 285C.060(1), 285C.215(3) & 285C.615(7)

Stats. Implemented: ORS 285C.060, 285C.175, 285C.215, 285C.606 & 461.740

Hist.: EDD 7-1989(Temp), f. & cert. ef. 10-17-89; EDD 8-1990, f. 4-13-90, cert. ef. 4-14-90; EDD 1-1996, f. 2-28-96, cert. ef. 3-1-96; EDD 3-2000, f. & cert. ef. 2-1-00, Renumbered from 123-070-0300; EDD 1-2005, f. & cert. ef. 2-25-05; EDD 1-2009, f. 2-23-09, cert. ef. 2-24-09; EDD 26-2009, f. 11-30-09, cert. ef. 12-1-09; OBDD 31-2010, f. 6-30-10, cert. ef. 7-1-10

#### **123-070-1100**

##### **Definitions**

For purposes of this division of administrative rules, in addition to definitions in OAR 123-001 (Procedural Rules), unless the context demands otherwise:

(1) Contact Agency means the entity that represents publicly funded job training providers. It shall designate a Contact Person charged with interacting with Benefited Businesses and other entities and with representing the Contact Agency on matters related to First Source Agreements.

(2) First Source Agreement means the contract between a Benefited Business and Providers, as executed by a Contact Agency, under this division of administrative rules, and it has the

same meaning as "first-source hiring agreement" under ORS 285C.050, 285C.606 and 461.740. It covers and is applicable to all of the Benefited Business's hiring or job openings, except for those persons or positions that are:

- (a) Hired solely to construct, renovate or install property;
- (b) Excluded by a waiver in accordance with OAR 123-070-1500; or
- (c) Specified in OAR 123-674 as inapplicable for enterprise zone purposes.

(3) Interagency Agreement is the agreement entered into among Providers as specified in OAR 123-070-1200.

(4) Provider has the same meaning as "publicly funded job training provider," as used in ORS 285C.050, 285C.606 and 461.740 and means one of the following:

- (a) A local office of the Oregon Department of Human Services that delivers training or employment services for low-income parents, seniors, persons with disabilities and so forth;
- (b) An administrative agent for programs under the federal **Workforce Investment Act of 1998** (Public Law 105-220) or amendments thereto;
- (c) A community college of this state;
- (d) A government or government-supported entity, similar to those in subsections (a) to (c) of this section, that is directly or indirectly engaged in training or assisting people to perform or succeed in the workplace or in a particular occupation; or
- (e) Any other entity that is a party to the Interagency Agreement as described in OAR 123-070-1200, but such inclusion is effective only insofar as the entity, including but not limited to a local office of this state's Employment Department, remains such a party.

(5) Qualified Applicants means individuals who have received job training assistance and who meet the Benefited Business's minimum requirements for education, experience, reliability and skills, or who are able to meet these requirements within a reasonable time period (as negotiated with the Benefited Business) with training provided either by the Benefited Business or by a Provider.

(6) As used in section (5) of this rule and OAR 123-070-1000, "received job training assistance" means the individual has received intake or other services from a Provider.

Stat. Auth.: ORS 285A.075, 285C.060(1), 285C.215(3) & 285C.615(7)

Stats. Implemented: ORS 285C.050, 285C.060, 285C.215, 285C.606 & 461.740

Hist.: EDD 7-1989(Temp), f. & cert. ef. 10-17-89; EDD 8-1990, f. 4-13-90, cert. ef. 4-14-90; EDD 1-1996, f. 2-28-96, cert. ef. 3-1-96; EDD 3-2000, f. & cert. ef. 2-1-00, Renumbered from 123-070-0310; EDD 1-2005, f. & cert. ef. 2-25-05; EDD 1-2009, f. 2-23-09, cert. ef. 2-24-09; EDD 26-2009, f. 11-30-09, cert. ef. 12-1-09; OBDD 31-2010, f. 6-30-10, cert. ef. 7-1-10

## 123-070-1150

### Affected Businesses

For purposes of this division of administrative rules:

(1) A Benefited Business means any for-profit business firm (regardless of its form of ownership or organization) that benefits directly or substantially from a state lottery-funded program, as indicated below in this section:

(a) Any of the following programs, throughout this state, except as set forth in section (3) of this rule:

- (A) Oregon Business Development Fund (ORS 285B.050 to 285B.098);
- (B) Strategic Reserve Fund (ORS 285B.266); or

(b) Any program financed by state lottery funds and administered by the Department, as so determined by the Director, including but not limited to industry development activities under ORS 285B.280 to 285B.286.

(2) A Benefited Business also means either of the following, regardless if section (1) of this rule applies too:

- (a) An "authorized business firm" as defined under ORS 285C.050(2) for an enterprise zone exemption on qualified property from ad valorem taxation under 285C.175; or
- (b) A business firm approved to receive or receiving the partial exemption of property from ad valorem taxation as an eligible project of the Strategic Investment Program under ORS 285C.600 to 285C.626.

(3) Regardless of association with a program in subsection (1)(a) or (b) of this rule, a business firm is not a "Benefited Business" solely because it receives any of the following from the Department, a grantee or any other entity:

- (a) A purchase order or contract to provide services;
- (b) Funds strictly for marketing or research activities; or
- (c) Any grant or loan of \$100,000 or less.

(4) Benefits substantially from any program by way of loan or grant financed by state lottery funds" as used in ORS 461.740(4)(a) and section (1) of this rule means that the business firm:

- (a) Receives benefits through infrastructure or facility improvements financed by an entity that is receiving state lottery-funded loan or grant assistance to immediately make such improvements; and
- (b) Was given prior notice from the Department or the entity that the First Source Agreement was a condition for the facility or infrastructure improvements or modifications arising from lottery funds.

Stat. Auth.: ORS 285A.075, 285C.060(1) & 285C.615(7)

Stats. Implemented: ORS 285C.050, 285C.060, 285C.175, 285C.215, 285C.606 & 461.740

Hist.: EDD 3-2000, f. & cert. ef. 2-1-00; EDD 1-2005, f. & cert. ef. 2-25-05; EDD 1-2009, f. 2-23-09, cert. ef. 2-24-09; EDD 26-2009, f. 1 1-30-09, cert. ef. 12-1-09

### **123-070-1300**

#### **Administration for Lottery-Funded Projects**

(1) For the lottery-funded programs listed in OAR 123-070-1150(1)(a), the Department shall take anticipatory actions that are necessary and appropriate to implement the requirement of the First Source Agreement in accordance with ORS 461.740, which may include but are not limited to requiring a Benefited Business to submit a copy of the First Source Agreement, or otherwise ensuring that one has been entered into, before the grant or loan is ultimately awarded.

(2) The responsibilities consistent with section (1) of this rule may be delegated by the Department to a grantee that is the direct recipient of lottery-derived funds and that provides the grant, loan or substantial benefits to the Benefited Business.

Stat. Auth.: ORS 285A.075 & 285A.1 10(1)

Stats. Implemented: ORS 461.740

Hist.: EDD 7-1989(Temp), f. & cert. ef. 10-17-89; EDD 8-1990, f. 4-13-90, cert. ef. 4-14-90; EDD 1-1996, f. 2-28-96, cert. ef. 3-1-96; EDD 3-2000, f. & cert. ef. 2-1-00, Renumbered from 123-070-0320; EDD 1-2005, f. & cert. ef. 2-25-05; EDD 26-2009, f. 11-30-09, cert. ef. 12-1-09

#### **Effect of First Source Agreement for Businesses**

### **123-070-1500**

#### **Waivers and Geographic Coverage of First Source Agreements**

(1) Except in the case of the Strategic Investment Program, the Director may issue a waiver that does the following:

- (a) Relieves a Benefited Business of the requirement of entering into the First Source Agreement, entirely; or
- (b) Excludes professional, managerial, technical, highly skilled or seasonal positions of a Benefited Business from the First Source Agreement.

(2) The Director shall make the final decision to grant the waiver, upon written recommendation by staff that explains why:

- (a) The Benefited Business's small size or the technical, professional or unusual nature of its needs with respect to employees means that it will be unable to fill positions with persons referred by the Providers, either in general or for the excluded positions, and will thus receive little or no meaningful service through the First Source Agreement; or
- (b) The waiver will further the goals or purposes of applicable and specified state policies, whether or not such policies are directly associated with the program.

(3) A Benefited Business may request a waiver by the Department under this rule at the time of application for the grant or loan assistance, or before execution of the contract for such assistance, in the case of lottery-funded programs, or at any time prior to qualifying for an enterprise zone exemption.

(4) Department staff will notify the Benefited Business and the Contact Agency for the geographic area in which the Benefited Business is located of the Director's decision and send a copy of any approved waiver. Such notice and distribution shall also include other entities as described in OAR 123-674, as applicable for an enterprise zone exemption.

(5) Except for an enterprise zone exemption, the First Source Agreement entered into by a Benefited Business shall apply only to the Benefited Business's operations at the site receiving the benefit, unless other locations are:

- (a) Designated by the Department; or
- (b) Specifically agreed to by the Benefited Business and the Contact Agency .

Stat. Auth.: ORS 285A.075, 285C.060(1) & 285C.215(3)  
 Stats. Implemented: ORS 285C.060, 285C.215 & 461.740  
 Hist.: EDD 7-1989(Temp), f. & cert. ef. 10-17-89; EDD 8-1990, f. 4-13-90, cert. ef. 4-14-90; EDD 9-1991, f. 9-6-91, cert. ef. 9-9-91; EDD 1-1996, f. 2-28-96, cert. ef. 3-1-96; EDD 3-2000, f. & cert. ef. 2-1-00, Renumbered from 123-070-0330; EDD 1-2005, f. & cert. ef. 2-25-05; EDD 26-2009, f. 11-30-09, cert. ef. 12-1-09; OBDD 31-2010, f. 6-30-10, cert. ef. 7-1-10

## 123-070-1600

### Duration of First Source Agreements

For purposes of a First Source Agreement:

(1) The term of agreement shall **begin** on or before the first date of any new hiring activity associated with employees for the benefited investment of the Benefited Business.

(2) The term of agreement shall **end**, as follows:

(a) Under state lottery-funded programs listed in OAR 123-070-1150(1), no less than 18 months from the date that the Benefited Business begins to request referrals under the First Source Agreement, unless a longer period is specified in the body of the First Source Agreement.

(b) Under tax incentive programs listed in OAR 123-070-1150(2), when the property tax exemption period concludes, which shall occur:

- (A) On December 31 of the final year of exemption; or
- (B) Sooner, in cases where an enterprise zone authorization application or exemption claim is formally withdrawn, or the exemption is disqualified or terminated by the county assessor, and the Benefited Business either does not exercise or has exhausted its right to appeal the refusal, denial, disqualification or termination.

(3) Nothing shall hinder or prevent a Benefited Business and a Contact Agency from mutually continuing to function under the arrangements of a First Source Agreement, even though the agreement is no longer in force, as stipulated by this rule.

Stat. Auth.: ORS 285A.075 & 285C.060(1)  
 Stats. Implemented: ORS 285C.060, 285C.215, 285C.606 & 461.740  
 Hist.: EDD 3-2000, f. & cert. ef. 2-1-00; EDD 1-2005, f. & cert. ef. 2-25-05; EDD 26-2009, f. 11-30-09, cert. ef. 12-1-09

## 123-070-1800

### Local/Case-Specific Modifications to the First Source Agreement

For purposes of OAR 123-070-1700, the First Source Agreement may be modified or amended as follows, as long as such modification or amendment does not alter or nullify the clear expression or the intent of any provision in OAR 123-070-1700(1):

(1) The Contact Agency or the Providers under the Interagency Agreement covering the geographic area in which the Benefited Business is located may add other substantive provisions or components to the First Source Agreement, but only through and pursuant to mutual consent by the Benefited Business, unless otherwise allowed in sections (2) or (3) of this rule or for data reporting as described in OAR 123-070-1900(4) and (5).

(2) As initiated or agreed to by the Contact Agency and Providers, a locally developed model First Source Agreement may include provisions that are conditions for receiving local administered incentives that are in addition to state lottery or property tax benefits. Such conditions do not, however, affect the benefits of programs listed in OAR 123-070-1150(1) or (2).

(3) With the consent and approval of the sponsor of an urban enterprise zone, the Contact Agency may add local conditions that are derived directly from the policy adopted by the sponsor under ORS 285C.150 to the regular format of the First Source Agreement that is used for the Benefited Businesses in that zone, and such additional provisions of the First

Source Agreement shall be conditions for the enterprise zone property tax exemption consistent with the standards in the zone sponsor's policy .

Stat. Auth.: ORS 285A.075 & 285C.060(1)

Stats. Implemented: ORS 285C.060, 285C.105, 285C.215, 285C.606 & 461.740

Hist.: EDD 3-2000, f. & cert. ef. 2-1-00; EDD 1-2005, f. & cert. ef. 2-25-05; EDD 26-2009, f. 11-30-09, cert. ef. 12-1-09

## **123-070-1900**

### **Data Collection**

(1) For purposes of OAR 123-070-1200(3)(e) and 123-070-1700(1)(e), the Contact Agency may collect and compile data by Benefited Business and by referring agency (Provider), and may specify in the First Source Agreement a schedule and method by which a Benefited Business submits or confirms data, for the following items:

(a) The Benefited Business's name, address and State Business Identification Number (BIN/unemployment insurance account number);

(b) The number and names of all persons referred to each Benefited Business through a First Source Agreement with the Contact Agency;

(c) The number of such referrals and the names of referred persons who were hired by the Benefited Business;

(d) The total number of individuals hired by each Benefited Business; or

(e) A consolidated list of applicable job openings, whether filled or unfilled, even if vacated or refilled.

(2) Any data collection under this rule shall be performed no more frequently than as follows, and then only for data specific to the intervening period in question and not previously collected:

(a) For Benefited Businesses as described in OAR 123-070-1150(1) (lottery-funded programs), the data may be collected for the following quarters: January 1 through March 31, April 1 through June 30, July 1 through September 30 and October 1 through December 31.

(b) For Benefited Businesses as described in OAR 123-070-1150(2) (tax incentive programs), the data may be collected on an annual basis, subject to modification under section (3) of this rule, for each calendar year until the end of the property tax exemption period.

(3) If a Benefited Business is receiving benefits under a program pursuant to both subsections (2)(a) and (b) of this rule, the data for the Benefited Business may be collected in the manner specified in subsection (2)(a) of this rule during the period in which the First Source Agreement is in effect for the lottery-funded benefits, with an annual compilation for every December 31. After such period, data collection may take place only as indicated in subsection (2)(b) of this rule.

(4) For Benefited Businesses as described in OAR 123-070-1150(2), the county under ORS 285C.609 or the enterprise zone sponsor may seek the Contact Agency's assistance as described in subsection (5) of this rule for the following:

(a) A Strategic Investment Program agreement under ORS 285C.609;

(b) An urban enterprise zone in which the sponsor has adopted a policy under ORS 285C.150 (irrespective of a regularly formatted First Source Agreement as provided in OAR 123-070-1800);

(c) Resolution adopted under ORS 285C.155 to waive employment increase requirement; or

(d) A written agreement for an extended period of enterprise zone abatement up to five years under ORS 285C.160.

(5) For the purposes of section (4) of this rule and this section, the zone sponsor or the county:

(a) Shall take appropriate and necessary actions to compensate the Contact Agency or Providers for any expenses that arise, and to safeguard the confidentiality of data submitted or compiled with respect to legal constraints affecting the Contact Agency or any Provider;

(b) May make the Benefited Business's submission of data specified in paragraph (c)(A) of this section a condition for the tax incentive benefit, if so provided in the policy or agreements under section (4) of this rule; and

(c) May in cooperation with the Contact Agency request the following:

(A) That the First Source Agreement specify particular types and formats of data that the Benefited Business must provide, either to demonstrate compliance with requirements under



ORS 285C.150, 285C.155, 285C.160, 285C.205 or 285C.609(5) or to satisfy other information needs of the sponsor or the county related to the Benefited Business's hiring, employment, training, compensation and so forth, insofar as it is practical, and as such data or information reasonably relates to the First Source Agreement; and

(B) To have such data transmitted through the Contact Agency. (No such data is to come from any other information source to which a Provider has access, including but not limited to unemployment insurance data.)

(6) For Benefited Businesses under the state lottery-funded programs listed in OAR 123-070-1150(1), the Contact Agency may provide appropriate compilations of data collected under this rule to the Department, as requested by the Director .

Stat. Auth.: ORS 285A.075 & 285C.060(1)


Stats. Implemented: ORS 285C.060, 285C.105, 285C.150, 285C.155, 285C.160, 285C.606, 285C.609 & 461.740

Hist.: EDD 7-1989(Temp), f. & cert. ef. 10-17-89; EDD 8-1990, f. 4-13-90, cert. ef. 4-14-90; EDD 3-1992(Temp), f. 3-12-92, cert. ef. 3-13-92; EDD 1-1996, f. 2-28-96, cert. ef. 3-1-96; EDD 9-1996, f. 10-8-96, cert. ef. 10-11-96; EDD 3-2000, f. & cert. ef. 2-1-00, Renumbered from 123-070-0360; EDD 1-2005, f. & cert. ef. 2-25-05; EDD 26-2009, f. 11-30-09, cert. ef. 12-1-09

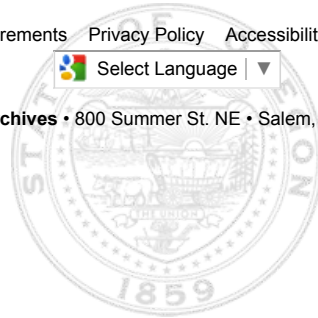
---

The official copy of an Oregon Administrative Rule is contained in the Administrative Order filed at the Archives Division, 800 Summer St. NE, Salem, Oregon 97310. Any discrepancies with the published version are satisfied in favor of the Administrative Order. The Oregon Administrative Rules and the Oregon Bulletin are copyrighted by the Oregon Secretary of State. [Terms and Conditions of Use](#)

[State Agency Directory](#) [System Requirements](#) [Privacy Policy](#) [Accessibility Policy](#) [Oregon Veterans](#) [Oregon.gov](#)

 [Select Language](#) ▼

**State Archives** • 800 Summer St. NE • Salem, OR 97310



**ASSOCIATED PRESS**

December 6, 2013

**Oregon Gives Intel a Nike-Like Tax Deal****by Associated Press**

Gov. John Kitzhaber announced Friday that he's giving Intel a tax deal similar to the one he granted Nike a year ago.

The 30-year agreement promises that any changes to Oregon's corporate tax structure won't affect Intel Corp. The chipmaker secured the agreement in exchange for an expansion it announced in October 2012. The company is spending \$500 million to expand a semiconductor plant in Hillsboro and must create at least 500 jobs to get the tax guarantee.

The legislature gave Kitzhaber temporary authority to make tax guarantees to companies planning large investments. It came in response to a demand from Nike, which said it would expand in Oregon if the state promised not to change a favorable tax structure.

Intel's deal comes a few weeks before Kitzhaber's authority to make tax guarantees expires at the end of the year.

The state taxes corporations based only on their Oregon sales. The so-called "single sales factor" is beneficial to large companies like Nike and Intel that have many employees and a lot of profit but relatively few sales in Oregon.

"Intel's commitment to Oregon is staggering, from its impact on job growth, to revenue for critical public services, to influencing an economy of innovation," Kitzhaber said in a statement.

Intel is Oregon's largest private employer, with about 16,000 workers in the state.

The tax guarantees for Nike and Intel promise that the single sales factor will remain in effect for those companies. The state is free to change the tax rate, but Nike and Intel would be exempt if the state decided to include measures such as payroll or property value in its corporate income tax calculations.

The deal would remain in effect even if Intel later eliminates the 500 additional jobs it's required to create.

In the early 1990s, Oregon calculated corporate income taxes giving equal weight to a company's in-state payroll, property and sales. The state began giving more weight to sales, eventually dropping payroll and property from the formula in 2005.

Critics say the single sales factor deprives the state of much-needed income from large corporations.


"It's more insulting than Nike, because Intel, unlike Nike, is a major proponent of wanting Oregon and other states to invest in education and create more engineers," said Chuck Sheketoff, director of the left-leaning Oregon Center for Public Policy.

**Fair Use Policy**

Posted in **Corporate Taxes**.

More about: [intel](#), [kitzhaber](#), [nike](#)

# Data centers: big tax breaks, little disclosure

Created on Friday, 25 October 2013 | Written by Bill MacKenzie | 

 [0 Comments](#)

Computer data centers built in Hillsboro's enterprise zone are enjoying generous tax breaks with almost no public accountability.

Companies with data centers already open or on the way include T5 Data Centers; Umpqua Holding Companies; Via West Inc.; Fortune Data Centers; Digital Realty Trust Inc., which houses NetApp in its building; and Adobe Systems Inc.

Oregon's 63 enterprise zones are designed to attract investments by exempting businesses from 100 percent of local property taxes on new investments for up to two years while construction is in process, and up to five years after that if they are growing employment in the zone. Because IT equipment in a data center must usually be refreshed within five years, the net effect is that there is no tax — neither sales nor property — on such equipment in enterprise zones. Fortune magazine said these "...are enormous financial incentives."

Are the tax breaks Hillsboro's giving out to data centers paying off for the city? Since the program is ballyhooed as a job creator, you'd expect stringent and substantial hiring requirements to be tied to the valuable property tax exemptions. You'd also expect the city, as well as the data center companies getting the tax breaks, would gleefully share their job creation achievements with the public to demonstrate their impact.

Forget about it.

Enterprise zone contracts require that if a data center already operates inside the zone and applies for benefits or renewal, it is required to increase employment by just 10 percent. If a firm locates a new data center in the zone, it needs to add only one employee to be in compliance. That's right, just one.

As for job creation, city officials said they don't have employment numbers on the data centers in the enterprise zone. Mark Clemons, Hillsboro's economic development director, has, however, said publicly that the companies have added a total of 1,420 jobs since joining the program. How he arrived at that number without knowing the number of employees at each company, including the data centers, is a puzzlement.

NetApp reported it has 12 full-time employees, plus one contractor, and expects to hire one or two more people over the next couple years. It's likely the other data centers have similarly small work forces.

As a general rule, if incentives cost more than the resulting jobs contribute to the economy, they are misplaced. Given the significant tax abatements enjoyed by the data centers in Hillsboro's enterprise zone, the wisdom of those abatements is questionable.

Still, the public can be assured that the employees earn good wages, right? When I asked all the data centers for the average wage of their employees, not a single one provided a figure.

Thankfully, Hillsboro taxpayers can easily find out the value of the tax abatement each of the multi-million dollar data centers is getting from the city. That way, the public can judge whether the foregone taxes are worth it in terms of investments made and jobs created.

Nope.

I asked the Washington County tax assessor's office how much the enterprise zone property tax exemptions save each data center annually.

"It has been determined that this information is confidential and exempt from disclosure," replied Julie McCloud with the Washington County Administrative Office.

Quite simply, there is little transparency to the entire data center process. Without a requirement that data centers make their employment numbers, average wages, investment numbers and the value of the tax abatements public, it is impossible to judge how much each new job is costing the city and whether the job gains are worth the tax losses.

Without that information, the public can't know whether the data center enterprise zone deals being cut by the city make sense.

It's time to change that.

Bill MacKenzie is a former congressional staff member, reporter and communications manager for a Hillsboro company.

## Final Photos Taken Seconds Before Tragedy Struck

[Learn More](#)

Sponsored by [omglane.com](#)



0 Comments

Pamplin Media

[1 Login](#) ▾

♥ Recommend

🔗 Share

Sort by Best ▾



Start the discussion...

Be the first to comment.

✉ Subscribe   [Add Disqus to your site](#)   [Add Disqus](#)   [Add](#)   [Privacy](#)

**DISQUS**

[JW DISQUS BACK TO TOP](#)

# Portland mayor wants 'housing emergency'; others want to see his plan



By **Brad Schmidt | The Oregonian/OregonLive**

[Email the author](#) | [Follow on Twitter](#)

on September 23, 2015 at 5:55 PM, updated September 24, 2015 at 1:03 PM

Portland Mayor Charlie Hales on Wednesday said he wants to **declare a "housing emergency" next month** with the hope of providing shelter for all homeless women by the end of the year.

Hales' announcement, which comes on the heels of a similar declaration in Los Angeles and a mayoral challenge from State Treasurer Ted Wheeler, would let Portland bypass its zoning code when siting shelters for the homeless.

Officials estimate about **1,800 homeless people lack shelter on any given night**, nearly one-third of them women. Portland leaders hope to convert city-owned property into a temporary shelter before the winter.

"We're not solving the problem fast enough to make the difference that Portlanders expect," Hales said. "And that's why I think this move is appropriate."

But Hales' directive offered no financial commitment. Nor would it impact soaring rental prices or create more affordable housing. And city rules **limit an emergency declaration to just two weeks**, although it could be extended.

The surprise announcement drew criticism from Wheeler, who has **made housing and homelessness an early part of his campaign** to unseat Hales next year. The rollout also rankled some city and county leaders who weren't told of Hales' plan until moments before he announced it.

"We need a mayor that will address the major problems facing the city every year - not just during an election year," Wheeler's campaign consultant, Jake Weigler, said in a statement.

The emergency declaration will head to the City Council for consideration Oct. 7. Officials are already looking at several sites for a women's shelter, although they declined to identify them.

Hales' chief of staff, Josh Alpert, said the emergency will not impact Right 2 Dream Too, **the high-profile Old Town homeless camp** that Portland officials have **tried unsuccessfully to relocate for two years**.

Portland Commissioner Nick Fish said he expects the City Council will help define broader efforts beyond temporary shelter for women. If that doesn't happen, he'll be disappointed.

## PORTLAND CITY HALL

[Mayor Ted Wheeler has new \\$50 million plan to fix Portland's roads](#)

[Portland's neighborhood office employees spent appropriately, internal report finds](#)

[Shhhh! Here's your check ... \(Letter to the editor\)](#)

[Protester files lawsuit after being pepper sprayed during Portland City Hall demonstration](#)

[Portland to sue Trump administration](#)

"Now the question is, can we use this exercise to swing for the fences and do some meaningful things to address the crisis?" Fish said.

After working with leaders from Multnomah County and the local housing authority to eradicate homelessness among veterans by year's end, Hales said he is emboldened and wants to do more.

Shifting the focus to homeless women is arbitrary, he said, but a worthwhile effort. "When I see a homeless woman on the street or in a doorway, my heart is touched," he said, "and I know Portlanders' hearts are touched."

Hales said he hopes the emergency declaration will ensure temporary shelter for hundreds of women this winter.

"It's a little bit of a back of the envelope strategy, frankly ... but I think it'll actually work," he said.

Hales' office organized a tour this week at possible sites in Southwest Portland. But he didn't make clear to Multnomah County Chairwoman Deborah Kafoury his plan to seek an emergency declaration.

Kafoury on Wednesday said she wants to see "specific action steps coupled with a clear financial commitment from the mayor."

"I'm not going to play political football with an issue that affects the lives of so many people and that I care so much about," she said. "If this discussion leads to action that gets people into housing, then I'm all for it. We just need to see the plan."

Hales, asked about a financial commitment Wednesday, made none.

"That's a good question," he said. "And that's something that the City Council ought to take up when we get the declaration in front of them."

Hales also offered no new solution to rising rental rates in Portland -- which have reached an average of \$1,243 a month -- although he said costs could flat line when more units come on line.

"This is a market problem, not a natural disaster," Hales said of rising rents. "So I don't think we actually have the legal authority to impose rent control."

Beyond city action, Hales wants the Multnomah County Board of Commissioners to seek an emergency designation from Gov. Kate Brown. That would allow officials to waive portions of the state building code, enabling shelters at buildings that otherwise would not be approved.

Alpert, Hales' chief of staff, said the city's self-imposed zoning code has created siting obstacles. The only place officials could locate a shelter is in Gateway, he said, miles from the city center.

Alpert said he couldn't provide a specific example of a proposed shelter that ran into zoning obstacles since Hales became mayor in 2013, other than Right 2 Dream Too. But he cited several general examples.

Some people regularly ask why the never-used Wapato Jail can't be used for shelter purposes, he said, and officials previously considered using city-owned parking garages as shelter.

"The zoning code gets in the way of that every time," he said. "Those are specific examples but we haven't actually gone for it, saying, we're going to fight right here, right now."

Hales' announcement came one day after leaders in Los Angeles declared a public emergency and pledged \$100 million toward housing and services.

Alpert said Portland officials had been working on their effort "for a little while."

Asked how long, he said: "Five or six days."



-- Brad Schmidt

[bschmidt@oregonian.com](mailto:bschmidt@oregonian.com)

503-294-7628

@cityhallwatch

Registration on or use of this site constitutes acceptance of our **User Agreement** and **Privacy Policy**

© 2017 Oregon Live LLC. All rights reserved (**About Us**).

The material on this site may not be reproduced, distributed, transmitted, cached or otherwise used, except with the prior written permission of Oregon Live LLC.

**Community Rules** apply to all content you upload or otherwise submit to this site.

 **Ad Choices**

# Multnomah County unveils new shelter for homeless women



By **Emily E. Smith** | [The Oregonian/OregonLive](#)  
on September 15, 2016 at 5:07 AM

As the region's population of homeless women grows, a new women's shelter is preparing to open this weekend in east Multnomah County.

The Gresham Women's Shelter will offer 90 beds, along with showers, dining tables, laundry facilities and work space in a remodeled building on East Burnside Street.

Human Solutions, a local nonprofit, will operate the shelter.

## SPRINGWATER CLEANUP

['Camp Amanda' homeless campers resist city notices to vacate public land](#)

[As Springwater Corridor sweep continues, Portland tallies cleanup results](#)

[Inside the Springwater Corridor cleanup \(video\)](#)

[Second day of Springwater sweep ends with 'light cleaning'](#)

[Springwater Corridor homeless sweep: 'There is no place to tell them to go'](#)

## All Stories

ADVERTISING

When doors open, the shelter expects to serve 45 women for the first few nights, and it will welcome more women within several days. The "soft opening" will allow staff to make sure the building is functioning smoothly and address any problems before running at full capacity, said Charles Hodge, Human Solutions' emergency services director.

Shelter staff said they'll initially reserve 20 beds for emergency needs, such as sexual assault or domestic violence victims who need a place to stay immediately. Operators plan to always keep some beds on hand for that purpose, but said they may adjust the number.

According to [a county report issued last week](#), the number of women who died on the streets of Multnomah County jumped to 17 last year, up from 4 in 2014. County spokesman David Austin said the new shelter addresses a pressing need as the number of homeless women in the county rises, particularly in east county.

At a recent open-house event, County Chair Deborah Kafoury said this shelter will provide crucial services, especially for women fleeing domestic violence.

But, she said, "shelter is not the end game."

Andy Miller, executive director of Human Solutions, said while shelter beds offer safety from the trauma of the streets, real security comes from moving the homeless into permanent housing.

"We want to ring the celebration bell of really ending this crisis," he said.

The women's shelter is the third new shelter this year in Multnomah County. A 134-bed **family shelter** opened in February. The county also opened a [200-bed shelter for adults](#), with priority given to women and couples, in its former sheriff's office headquarters in July.

A fourth shelter, with 120 beds for couples, is set to open next month.

-- Emily E. Smith

[esmith@oregonian.com](mailto:esmith@oregonian.com)

503-294-4032; [@emilyesmith](#)

Registration on or use of this site constitutes acceptance of our **User Agreement** and **Privacy Policy**

© 2017 Oregon Live LLC. All rights reserved (**About Us**).

The material on this site may not be reproduced, distributed, transmitted, cached or otherwise used, except with the prior written permission of Oregon Live LLC.

**Community Rules** apply to all content you upload or otherwise submit to this site.

[▶ Ad Choices](#)

# Multnomah County opens women and couples homeless shelter in Southeast Portland



By **Molly Harbarger** | [The Oregonian/OregonLive](#)

[Email the author](#) | [Follow on Twitter](#)

on November 14, 2016 at 6:09 PM, updated November 15, 2016 at 9:04 AM

Multnomah County officials and homeless advocates gathered for the fourth time this year to christen a new shelter. This one offers double beds, an uncommon luxury for homeless couples who want to stay together as they seek more permanent housing.

Monday, the **Transition Projects**-operated Willamette Center opened with 120 single and double beds for women and couples.

It's the latest of six shelters that the county plans to open, providing 650 new beds for homeless people for a total of 1,240 by mid-2017.

But that number still falls short of Multnomah County's homeless population -- 4,600 including people who live in shelters and are couch-surfing.

The Willamette Center, and the men's winter shelter opening next week, are good steps forward, but not enough, advocates and officials said.

"The ultimate response to the tragedy of homelessness is more affordable housing," Multnomah County Chairwoman Deborah Kafoury said at the opening.

The new shelter is tucked on a corner of Southeast Milwaukie Avenue near McLoughlin Boulevard and the Orange MAX Line. It's in the former St. Vincent de Paul emergency assistance office. Now, walls are painted in green and orange, or in chalkboard paint with inspiring quotes written on them. Double beds fill one room and single beds another, with lockers lining the edges. The large kitchen is stocked with dishes and cups, leading to an eating area and computer bank.

Lisa Lake, president of nonprofit Advocacy 5, said that the 120 beds in a shelter like Willamette Center, where people can stay not just overnight but during the day, take hot showers and have a place to store their belongings, has a multiplying factor.

"Every 100 to 120 we do just decreases the number of people on the streets," Lake said.

"Once people are in shelter, it's easier for them to connect to services and they basically go from there to some sort of semi or permanent housing."

## Need a place to stay?

## OUR HOMELESS CRISIS

Who: Women and couples who are 18 years old or older. People 55 and older, are disabled or veterans are prioritized to gets beds first.

Pets are welcome.

Where: 5120 SE Milwaukie Ave. in Portland

How: To stay at the Willamette Center, call Transition Projects at 503-280-4700 or show up at Transition Projects Day Center at 650 N.W. Irving Street.

That is what happened for Julianne Dunn and Dominick Hart.

Their two-year relationship has mostly taken place outside. He was playing drums across from the Multnomah County Justice Center and she asked to join on guitar.

They slept in a tent, then in a warehouse and doorways from Canby to Portland. One night in downtown Portland, someone threw a backpack full of unused needles at them.

That's when Hart insisted they couldn't keep sleeping outside. He had been diagnosed with colon cancer and needed stability to get treatment. They went to the Transition Projects office the next day and got the last spot at the county's new **Hansen Shelter**, which opened in July as one of the only homeless shelters that accepted couples.

"We had already decided if we couldn't stay together, we would have gone to living in a tent together," Dunn said.

Many shelters either take men or women, but not both, which either deters couples from seeking shelter or makes the relationship impossible to maintain. For Hart, it would have meant losing the person who makes sure he goes to his scheduled oncologist appointments.

They were connected with a case manager, who helped them navigate social service agencies and listened to their problems and desires. Within two months of moving into the Hansen Shelter, they had jobs at Street Roots and a new apartment on their own. There, they can prepare for their doctor appointments and don't have to bring everything with them on their backs.

"I'm alive because I was given a chance to do it," Hart said. He's starting a 12-week treatment for his colon cancer after Thanksgiving. "Now I get to rest."

As winter approaches, the new shelters are sorely needed. A 134-bed **family shelter** opened in February, a **200-bed shelter for adults**, with priority given to women and couples, opened in the former sheriff's office headquarters in July. The **Gresham Women's Shelter**, which opened in September, offers 90 beds.

But some say that Portland officials need a plan as big as the scrapped Terminal 1 housing plan to truly make strides.

Ree Kaarhus of nonprofit Boots on the Ground PDX said the Portland City Council has yet to take meaningful action on homeless issues and that the plan by a private developer to turn a marine port warehouse into a large-scale homeless shelter was an example of the delay.

City councilors scrapped the Terminal 1 plan after a disagreement with the developer over who would have operated the shelter. Kaarhus said the plan wasn't perfect, but she's frustrated that 650 beds don't come close to the scale needed to house the area's homeless population.

## Part 1: Our Homeless Crisis

### A look at the series

### Tricky statistics

### How to help

### Portland's successes

### New work to end homelessness

### Tell us what you think, want to know

## Part 2: No space anywhere

### Help us tell the story with #WhereISleptPDX

### We want your thoughts, questions about shelters

### Live chat: Alexa Mason of Portland Rescue Mission answers questions

## Part 3: Lio Alaalatoa makes his nightly rounds offering food, water, blankets — and hope

### We want your thoughts and questions about life on the streets

## Part 4: Struggling in the suburbs

### We want your thoughts and questions on suburban poverty

## Part 5: Is Portland a magnet for the homeless?

## Part 6: How do you handle panhandling?

### Don't like giving to panhandlers? Here are other ways to help

## Part 7: Generations of federal government decisions add up to 600,000 homeless people

## Part 8: Solutions to Our Homeless Crisis

"It's more than a year after they've declared a state of emergency, and here we are," Kaarhus said.

[All Stories](#)

-- Molly Harbarger

[mharbarger@oregonian.com](mailto:mharbarger@oregonian.com)

503-294-5923

[@MollyHarbarger](#)

Registration on or use of this site constitutes acceptance of our **User Agreement** and **Privacy Policy**

© 2017 Oregon Live LLC. All rights reserved (**About Us**).

The material on this site may not be reproduced, distributed, transmitted, cached or otherwise used, except with the prior written permission of Oregon Live LLC.

**Community Rules** apply to all content you upload or otherwise submit to this site.

[▶ Ad Choices](#)



# Tiny house village for homeless women approved by Kenton neighborhood



By **Molly Harbarger** | [The Oregonian/OregonLive](#)

[Email the author](#) | [Follow on Twitter](#)

on March 08, 2017 at 10:06 PM, updated March 09, 2017 at 4:30 PM

The newest idea in housing homeless people earned the first round of approval Wednesday night with a vote by the Kenton neighborhood in North Portland.

The neighborhood residents voted 178 to 75 in favor of a village of 14 tiny houses for homeless women.

Key city officials back the pilot project to form a community with shared restrooms, common space and a garden at a site off North Argyle Street, near Kenton Park. **Charlie Hales kicked off the idea** during his term as mayor and now Mayor Ted Wheeler is championing it as a better alternative to people sleeping on the streets or in tent villages.

"It's pouring rain out tonight, it's cold, it's windy. We've got lots of people living out on the streets and under bridges," Wheeler told a packed room of nearly 200 people. "We know we can do better. This is not permanent housing for people who are truly in distress, this is obviously not the kind of supported housing people would like to see on the other end of the homeless services spectrum, but it's an important gap we're filling."

The Portland State University Center for Public Interest Design teamed up with homeless advocacy organization Village Coalition to launch the project. The structures measure less than 8-by-12 feet and are more like sleeping pods with storage space than a home to build a life in.

Backers expect the pods to function like a homeless shelter, where outreach workers and social service agencies work with residents to help them access health care, financial services and, ultimately, permanent housing.

City and Multnomah County officials have been grappling with how to handle the area's homeless population -- more than 3,000 in a 2015 count and expected to be the same if not higher in a **2017 count**.

In an **interview with The Oregonian/OregonLive at the beginning of his term**, Wheeler said he wants to move away from the outdoor camping communities that sprung up organically in some places and received permission by the city to exist in the past few years.

Instead, he pointed to the tiny house idea as a better solution.

The pods are on an empty lot next to the Oregon Convention Center, but now will move to the Kenton neighborhood.

Catholic Charities will manage the village, providing support on-site and through social workers who will help each woman navigate her way to permanent housing.

Margi Dechenne, housing transitions program manager at Catholic Charities, said the nonprofit also will help the women figure out a self-governance structure so they can make sure someone is always on watch and ensure residents are following the ban on drugs, alcohol and overnight guests as well as other rules they'll set.

The model already exists for homeless camps Dignity Village, Right 2 Dream Too and Hazelnut Grove, but the Kenton project would be the first initiated by the city with neighborhood, city, county and advocate input. It would go on an unused site owned by the Portland Development Commission.

Wheeler promised that he and the City Council would respond to the neighborhood's needs and concerns, but a strong current of distrust still ran through much of the project's opposition.

"As it stands right now, I am one of the very frustrated citizens who pays his taxes, follows the rules and would never endorse this project as it stands," said Larry Mills, a 68-year Kenton resident. North Portland has been allowed to suffer while the city invested in other places, he said.

Others said they worry about safety and sanitation. Many said they were dubious of the city's claim that the project would truly end in a year.

Marc Jolin, director for the city-county homeless services office, said the project is scheduled to last 12 months from its opening date, which he hopes will be in mid-to-late April. Transition Projects, a nonprofit homeless services provider, has a tentative deal to use the land where the village will sit as an affordable housing site after that.

But if that development falls through or is delayed, Jolin said the city could possibly ask the neighborhood to extend the pilot project's lifespan.

"We will be there to help the village relocate when it is time for it to close down and if, for some reason, we are not able to find a new location, we will be there to make sure the women transition to some other space," Jolin said.

The bulk of comments and questions supported the idea.

Sheila Mason, who has lived in Kenton for more than 10 years, said she was skeptical of the idea when she heard about it in December. She joined the neighborhood association's subcommittee that worked with a team of high school and college students, nonprofits, advocates and city and county officials to put the plan together.

"To be honest, when I approached the situation I was not in favor," Mason said. "I came to my first meeting with some pretty tough questions that I presented in a pretty tough manner."

Over time, she grew enthusiastic about the plan after seeing it work in other places around the city.

"I have no illusion that it'll be perfect and I don't think you should either," Mason said. "Humans are messy. We all are in some way. But we have to start somewhere."

She also pointed out in response to some opponents' claims that they were being saddled with other areas' problems that women from Kenton will be first in line for the 14 houses, with women from North Portland next.

Jessie Burke, a 15-year Kenton resident and owner of local Posies Bakery and Cafe, admonished the residents who complained about Kenton being the pilot location. She also co-owns The Society Hotel in Old Town and said she works with city officials on homelessness solutions and hears the same complaints all the time.

"Everyone crying about how terrible it is, but not in my backyard, is what we've heard in every neighborhood," Burke said. "As proud as I am of this neighborhood, I want the neighborhood, as well as the business community, to be a model for the city. Why not Kenton?"

Portland Commissioner Chloe Eudaly urged residents to vote for the project and took the stage to assure people that through her leadership of the Office of Neighborhood Involvement, this would not be just a Kenton issue.

"No neighborhood is going to be exempt from this conversation," Eudaly said. "This is a problem for all of us to solve. We're not talking about importing people to Kenton. We're talking about housing your houseless neighbors."

-- Molly Harbarger

[mharbarger@oregonian.com](mailto:mharbarger@oregonian.com)

503-294-5923

[@MollyHarbarger](#)

Registration on or use of this site constitutes acceptance of our **User Agreement** and **Privacy Policy**

© 2017 Oregon Live LLC. All rights reserved (**About Us**).

The material on this site may not be reproduced, distributed, transmitted, cached or otherwise used, except with the prior written permission of Oregon Live LLC.

**Community Rules** apply to all content you upload or otherwise submit to this site.

 **Ad Choices**

# 2015 ORS 200.015<sup>1</sup>

## Legislative findings

[Text](#)[News](#)[Annotations](#)[Related Statutes](#)

**(1)** The Legislative Assembly supports the

aspirations of minorities, women and emerging small businesses to enter the mainstream of Oregon social, political and economic life.

**(2)** The Legislative Assembly finds:

- (a)** The opportunity for full participation in our free enterprise system by minorities, women and emerging small businesses is essential;
- (b)** Greater economic opportunity for minorities, women and emerging small businesses is essential;
- (c)** Review of public programs to remedy historical patterns of exclusion of and discrimination against racial or ethnic groups and women is needed;
- (d)** Public policies and programs to eliminate the effects of long-term, open and pervasive exclusion of and discrimination against minorities and women from the business sector, including increased opportunities to integrate minorities and women into the full economic life of the community should be reviewed; **and**
- (e)** In cooperation with the private sector, the affected populations, interested groups and appropriate governmental entities, a program of review should be established to recommend remedies for the unfortunate effects of social, political and economic inequity that still exist.

**(3)** Women and minorities are rebuttably presumed to be:

- (a)** Economically disadvantaged.
- (b)** Socially disadvantaged. [1987 c.893 §3; 1989 c.1043 §2]

**2015 ORS 200.090<sup>1</sup>****Contracting agencies to pursue policy of providing opportunities**[Text](#)[News](#)[Annotations](#)[Related Statutes](#)

Contracting agencies shall aggressively pursue a policy of providing opportunities for disadvantaged business enterprises, minority-owned businesses, woman-owned businesses, businesses that service-disabled veterans own and emerging small businesses and shall cooperate with the Governor's Policy Advisor for Economic and Business Equity to determine the best means by which to make such opportunities available. [1989 c.1043 §10; 2015 c.565 §8]

## 2015 ORS 285C.215<sup>1</sup>

### First-source hiring agreements

#### • rules

- (1) The qualified property of an authorized business firm may be exempt from property tax under ORS 285C.175 (Enterprise zone exemption) only if the firm enters into a first-source hiring agreement for the period of property tax exemption. The agreement must be executed prior to the assessment date for the first tax year for which qualified property of the firm is exempt under ORS 285C.175 (Enterprise zone exemption) and must expire no sooner than December 31 of the final year of the exemption.
- (2) (a) If a firm has not entered into a first-source hiring agreement when qualified property of the firm is first placed in service, as of April 1 preceding the first tax year for which the authorized business firm claims an exemption for qualified property under ORS 285C.175 (Enterprise zone exemption), the sponsor shall inform the county assessor that an agreement under this section has not been executed.  
  
(b) A publicly funded job training provider having knowledge of the date when qualified property of the firm is first placed in service may also inform the county assessor that an agreement under this section has not been executed.
- (3) In accordance with rules adopted by the Oregon Business Development Department, the Director of the Oregon Business Development Department may waive the requirements of subsection (1) of this section for an authorized business firm. The rules adopted by the department shall provide for a waiver under this subsection when the director finds that:
  - (a) The business firm is unable to employ persons referred under the agreement; **or**
  - (b) The waiver would further the goals and purposes of applicable state policies. [Formerly 285B.710]

---

<sup>1</sup> Legislative Counsel Committee, *CHAPTER 285C—Economic Development III*, [https://www.oregonlegislature.gov/bills\\_laws/ors/ors285C.html](https://www.oregonlegislature.gov/bills_laws/ors/ors285C.html) (2015) (last accessed Jul. 16, 2016).



## ▼ RSR Award Detail

# Research Spending & Results

## Award Detail

Awardee:	PORTLAND COMMUNITY COLLEGE
Doing Business As Name:	Portland Community College
PD/PI:	Dorina Cornea-Hasegan (971) 722-7626 dcorneah@pcc.edu
Co-PD(s)/co-PI(s):	Gayathridevi Iyer ~000722712 Aaron Scher ~000722903
Award Date:	11/09/2016
Estimated Total Award Amount:	\$ 879,337
Funds Obligated to Date:	\$ 879,337 FY 2017=\$879,337
Start Date:	12/01/2016
End Date:	11/30/2021
Transaction Type:	Grant
Agency:	NSF
Awarding Agency Code:	4900
Funding Agency Code:	4900
CFDA Number:	47.076
Primary Program Source:	045176 H-1B FUND, EHR, NSF
Award Title or Description:	Mentoring in Manufacturing Technology
Federal Award ID Number:	1643624
DUNS ID:	050972025
Parent DUNS ID:	050972025
Program:	S-STEM:SCHLR SCI TECH ENG&MATH
Program Officer:	Elizabeth Teles (703) 292-8670 ejteles@nsf.gov

## Awardee Location

Street:	12000 SW 49th Avenue
City:	Portland
State:	OR
ZIP:	97219-7132
County:	Portland
Country:	US
Awardee Cong. District:	05

## Primary Place of Performance

Organization Name:	Portland Community College
Street:	17705 NW Springville Rd.
City:	Protland
State:	OR

Research.gov | NSF | Innovation | Locations | Awards Detail

ZIP:	97229-1744
County:	Portland
Country:	US
Cong. District:	01

## Abstract at Time of Award

This project at the Rock Creek campus of Portland Community College (PCC) in Oregon, entitled Mentoring in Manufacturing Technology (MeMT), is designed to address the important national issue of increasing educational opportunities for low-income, academically talented science, technology, engineering, and mathematics (STEM) students by providing scholarships and strong curricular and co-curricular support. The project will focus on recruitment and retention strategies that have proven successful in increasing the number of females and underrepresented minorities in STEM careers and will add to the knowledge base of what works in recruitment and retention strategies, for whom, and in what circumstances. In addition, the project will research the extent to which embedding mathematical strategies into targeted gateway courses enables students to better understand the engineering mathematics in later engineering technology courses and programs and the effectiveness of a formal mentoring program upon retention of scholars to graduation. The project has two connecting strategies for broadening impact: 1) to evaluate the effectiveness of activities that lower barriers to participation for females and other underrepresented students in STEM fields, and 2) to implement and sustain evidence-based practices that have an impact on recruitment, retention and degree completion of underrepresented groups in STEM fields and to share the practices that had the greatest impact and would benefit other institutions. A total of 80 one-year scholarships will be awarded to students enrolled in Microelectronics Technology, Solar Voltaic Manufacturing Technology, and Automated Manufacturing Technology, and eight one-year scholarships for scholars transferring to Oregon Institute of Technology seeking a baccalaureate degree in Electronics Engineering Technology, Electrical Engineering, and Manufacturing Engineering Technology. The overall objectives of the MeMT program are to 1) increase the percentage of females enrolled in targeted engineering technology programs from 18% to 25% over five years; 2) increase the percentage of minorities enrolled in targeted engineering technology programs from 25% to 35% over five years; 3) retain 90% of scholars to completion of an associate degree; 4) ensure that 90% of graduating scholars will be employed in a position related to their degree/major or enrolled at Oregon Institute of Technology; and 5) increase the retention rate of students in targeted entry-level courses. The MeMT project will implement and test a student mentoring program based on scholar, faculty and alumni/industry participation that is being adapted from materials developed by the University of Maryland, Baltimore County Center for their Women in Technology program along with the ENGAGE Faculty-Student Interactions. A STEM Camp and two STEM workshops each year will be offered and will be open to high school seniors, with marketing and recruitment focusing on minorities and women. A cohort-building structure will be put into place where scholars will be scheduled within the same classes where possible. One-on-one intrusive academic advising will be required for scholars, as will small-group and individual tutoring for those who need additional assistance. NSF-funded initiatives that include the Institute for Women in Trades, Technology, and Science (IWITTS) and ENGAGE Engineering will be adapted to assist in recruiting and retaining females and underrepresented minorities into the three targeted programs. Faculty members will receive training for incorporating these strategies into activities and curriculum. Everyday Examples in Engineering, Spatial Visualization Skills, and concept-based formulas, graphs, and other representations will be incorporated into classes that prepare students to solve mathematics problems in gateway engineering courses.

For specific questions or comments about this information including the NSF Project Outcomes Report, [contact us](#).



benjamin barber <starworks5@gmail.com>

## Your Tickets for Tech Community Open House PDC's 2015-2020 Strategic Plan

1 message

**Eventbrite** <orders@eventbrite.com>  
Reply-To: danielle@uncorkedstudios.com  
To: starworks5@gmail.com

Tue, Mar 3, 2015 at 5:11 PM

**Eventbrite**

[Find events](#) [My Tickets](#)

Hi benjamin, this is your order confirmation for  
**Tech Community Open House: PDC's  
2015-2020 Strategic Plan**

Organized by Uncorked Studios

Here are your tickets



**Mobile Tickets**



Available on  
App Store



— or —



**Paper Tickets**

Open the email attachment  
or [download here](#)

## Questions about this event?

Contact the organizer at [danielle@uncorkedstudios.com](mailto:danielle@uncorkedstudios.com)

Order Summary


March 3, 2015


Order #: 402519561

Name	Type	Quantity
benjamin barber	RSVP	1


This order is subject to Eventbrite [Terms of Service](#), [Privacy Policy](#), and [Cookie Policy](#)

About this event

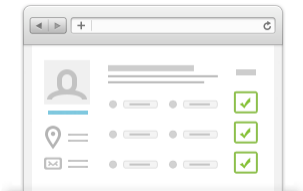
 Tuesday, March 3, 2015 from 5:30 PM to 7:00 PM (PST)

 Uncorked Studios  
1001 Southeast Water Avenue  
#350  
Portland, OR 97214



 Add to my calendar:

[Google](#) · [Outlook](#) · [iCal](#) · [Yahoo](#)



Your Account

[Log in](#) to access tickets and manage your orders.

### Create your own event

Anyone can sell tickets or manage registration with Eventbrite.

[Learn More](#)



### Discover great events

Find local events that match your passions.

[See events](#)



[ABOUT](#)

[HELP](#)

[MY ACCOUNT](#)

[CONTACT US](#)

[PRIVACY](#)

[TERMS](#)

[BLOG](#)



This email was sent to [starworks5@gmail.com](mailto:starworks5@gmail.com)

[Eventbrite](#) | 155 5th St | San Francisco, CA 94103

Copyright © 2015 Eventbrite. All rights reserved.



**15916022251-402519561-ticket.pdf**

52K

The Portland Development Commission is throwing funds behind one of the five action items highlighted in the city's much-discussed tech diversity pledge.

The PDC has committed \$100,000 in grants to four programs as a pilot effort designed to raise awareness about technology careers and provide training for such careers among minority populations.



The  
PDC  
is  
granting  
\$100,000  
across  
four  
programs  
aimed  
at  
diversifying  
the  
Portland  
tech... **more**

ZIQUIU

The four programs receiving money are:

Code Fellows, a code school with a Portland campus. The school will use the money to provide scholarships to 15 people from underrepresented groups.

Mt. Hood Community College and the Rosewood Initiative. The money will help 16 people from underrepresented groups take courses.

Portland Youth Builders, which offers high school completion or vocational training for young people. The money will be used to enroll 50 students in the program with more than half of the seats going to minority individuals.

iUrban Teen, which offers technology courses and exposure to higher education to minority students. The group will use the money to enroll at least 40 minority high school juniors and seniors in the group's iCode program.

“This opportunity by PDC to expand our iCode program for underrepresented high school students will assist iUrban Teen in assuring youth have the needed skill-sets for future careers,” said iUrban Teen founder Deena Pierott in a written statement.



The move is part of a broader effort by the PDC to work with the city's tech industry to ensure that the new jobs and opportunities created by the booming scene benefit all city residents. Also this week, the group unveiled a project aimed at minority entrepreneurs to offer a six-month training program to help business owners grow their organizations.

The PDC was also instrumental in creating the Portland Tech Diversity Pledge, which has a five-point action plan for companies to follow.

*Malia covers technology, startups and entrepreneurs. [Sign up for her free, twice-weekly newsletter, TechFlash.](#)*

# PDC

## PORTLAND DEVELOPMENT COMMISSION

**DATE:** June 22, 2011  
**TO:** Board of Commissioners  
**FROM:** Patrick Quinton, Executive Director  
**SUBJECT:** Report Number 11-57  
Disparity Study Update

### EXECUTIVE SUMMARY

#### **BOARD ACTION REQUESTED**

None — information only.

#### **SUMMARY**

The City of Portland and the Portland Development Commission (PDC) are committed to equal opportunity through policies that promote diversity and equity in contracting. As part of that commitment, they engaged a nationally recognized consultant firm to conduct a disparity study on our current efforts to promote a "level playing field" for minority- and women-owned firms in contracting. This agenda item will provide an informational briefing on the study's background, process, methodology and results, as well as anticipated next steps based on Board discussion and direction.

### BACKGROUND

#### Need for a Disparity Study

Through their business equity programs and small business support programs, the City of Portland and PDC encourage fair and equitable contracting for women and people of color. In 1995, the City and PDC took part in the Oregon Regional Consortium Disparity Study that examined public construction contracting methods. The 1995 Study concluded that minority and women-owned businesses were underutilized at the prime contracting level.

The 1995 Study also made a series of recommendations that resulted in the City's adoption of a Fair Contracting and Employment Strategy and the PDC's Business and Workforce Equity Policy.

Data from the previous study is now stale and may not provide a sufficient legal basis to support the City and PDC's current Minority Business Enterprises (MBE) and Woman Business Enterprises (WBE) programs.

Board Report No. 11-57 — Disparity Study Update  
June 22, 2011

Page 2 of 7

This new Study evaluated the effectiveness of race and gender-neutral practices in public construction and construction-related professional services contracting as well as relevant City and PDC policies and practices.

#### Consultant and Team Selection

In April 2009, a Request for Proposals (RFP) for a new Disparity Study was issued. The evaluation committee, which included community representatives, chose BBC Research & Consulting to perform the Disparity Study for the City and PDC. The selection panel included Carmen Rubio, Jaime Lim, Loretta Young, Linda Andrews and Tracy Reeve.

For the City and PDC studies, BBC worked with five subcontractors, four of which were minority or women-owned firms, all with offices in the Portland area:

- FM Burch & Associates (interviews)
- Group AGB (data collection, procurement review)
- Montesi & Associates (interviews)
- Holland & Knight (legal counsel)
- Customer Research International (telephone surveys & interviews).

In September 2009 a contract was awarded to BBC in the amount of \$831,000. (The City contributed \$540,330 and PDC contributed \$290,670.)

Commissioner Fish convened a Commissioner's Advisory Committee which met five times during the process. Members included:

- Marcela Alcantar: Alcantar and Associates (small business)
- Jason Lim: Asian Reporter
- Nate McCoy: Portland Housing Bureau
- Penny Painter: Oregon Native American Chamber
- Maurice Rahming: National Association of Minority Contractors of Oregon
- Carmen Rubio: Latino Network
- Andrew Beyer: Associated General Contractors
- Rudy Martinez: Pacific Northwest Regional Council of Carpenters
- Mel Sears: Parsons Brinckerhoff (corporation/large business)

Board Report No. 11-57 — Disparity Study Update  
June 22, 2011

Page 3 of 7

In April 2010, as a result of feedback from the Commissioner's Advisory Group, the study added construction-related professional services contracts to the study. This change added an additional \$75,000 to the City's portion of the study and brought the overall contract value to \$906,000. The team agreed that extending the schedule to complete this added research was critical to the work product.

### BBC Experience

BBC is a forty-one year old market, economic and policy research firm based in Denver, Colorado. They became involved in disparity studies shortly after the Supreme Court struck down the City of Richmond, Virginia minority-owned business program. Clients include large cities such as Phoenix, Fort Worth, Las Vegas and Columbus, Ohio.

BBC conducted the 1990 Denver disparity study and provided support to the City of Denver when it was sued by a local firm over the constitutionality of the program. The Denver minority and women-owned business program was upheld by the 10<sup>th</sup> Circuit Court in 2003.

More recently, BBC conducted a disparity analysis for the California Department of Transportation (Caltrans). The Associated General Contractors of San Diego and the Pacific Legal Foundation challenged Caltrans in court. The United States District Court, Eastern District of California, ruled in favor of Caltrans in a summary judgment and found that the disparity study was comprehensive, included extensive statistical evidence as well as anecdotal evidence, provided substantial statistical and anecdotal evidence of discrimination in the California contract industry and supported Caltrans' implementation of the Federal DBE program.

Over the past 20 years, BBC has conducted disparity and availability analyses for over 80 state and local governments across the United States.

### Timeline and Methodology

BBC began the assignment in the fall of 2009 and presented a draft report to the City and PDC in January 2011.

The study examined a five year contracting period from July 1, 2004 – June 30, 2009. Research was conducted on procurement and contracting procedures and Minority, Women and Emerging Small Business programs, utilization, availability and disparities.

The study team also evaluated the legal framework governing race and gender-neutral practices in public construction, analyzed marketplace conditions and explored possible explanations for any disparities.

Board Report No. 11-57 — Disparity Study Update  
June 22, 2011

Page 4 of 7

BBC developed a statistical model using US Census data and other information on the local marketplace. They compiled and analyzed hundreds of bids and proposals on City contracts; performed telephone interviews with thousands of local businesses; and conducted in-depth personal interviews with sixty business owners, trade associations and other individuals knowledgeable about local marketplace conditions.

### Draft Report Elements

BBC's study stands as a three-legged stool. The courts have ruled that for a disparity study to have legal standing, it needs to blend together three essential components:

#### 1. Statistical results of utilization and disparity:

For the statistical part of the study, BBC conducted a complex quantitative and qualitative analysis of MBE and WBE firms in a seven-county Metropolitan Statistical Area of Portland/Southwest Washington.

BBC designed the availability analysis to be independent of any list (state certification, vendor list) as such lists might be too limiting. It requires data about MBE's, WBE's and majority-owned firms on an "apples to apples" basis. All firms were identified from a consistent source. (e.g., the state certification list could not be used as a stand-alone source because no such list exists for non-certified or majority-owned firms.)

The study team contacted thousands of firms by telephone to give them an opportunity to discuss their experiences when attempting to perform work with the City, PDC and in the local marketplace. Extensive efforts were made to contact local firms for specific types of City construction and construction-related professional services work.

Firms were telephone surveyed and asked whether they were qualified and interested in City work, the types of work they conduct, sizes of contracts they perform and other firm characteristics. Not all contacted firms reported qualifications and interest in City or PDC work.

Businesses that did express qualifications and interest were typically only available for certain types and sizes of prime or subcontracts. (e.g., a business might have only been in operation for a portion of the study period and thus only would have been available for certain years of contracts).

Overall availability was determined by examining the number of MBEs and WBEs available for each prime and subcontract in proportion to the total number of firms available for that prime or subcontract.

Board Report No. 11-57 — Disparity Study Update  
June 22, 2011

Page 5 of 7

Contract-by-contract availability results were then aggregated on a dollar-weighted basis to determine the overall percentage of City contract dollars that might be expected to go to MBEs and WBEs.

The accuracy of availability benchmarks (dollar-weighted percentage availability), not the size of the availability database is most important to the study.

## 2) The catalogue of anecdotal evidence:

The second part of the study consists of anecdotal evidence and in-depth interviews. BBC analyzed City and PDC contracting processes, local marketplace conditions and potential business assistance programs.

There is evidence of disparities within the local marketplace. The anecdotal findings and interviews illustrated racism and discrimination in contracting, in addition to significant barriers for minority- and women-owned firms to do business in Portland. Some of the findings are summarized below:

- Annual revenue of certain MBE groups and WBE's is lower than other firms.
- MBEs and WBEs face greater disadvantages than other firm owners when seeking capital, bonding and insurance.
- MBEs and WBEs face barriers to working as prime and subcontractors on local public sector contracts.
- Current availability of MBEs and WBEs to perform City construction and construction-related professional services contracts is less than what might be expected if minorities and women had the same opportunities to enter and advance within these industries.

## 3) The public comment in response to the report draft:

The study team analyzed the comments and questions received during the public comment period following the release of the draft report.

Input was solicited via the PDC and City websites, letters, email and in a public forum. Based on this information, the final report reflects the public comments in the following areas:

- Statements regarding experiences or program recommendations were added to the anecdotal and qualitative material within the report.
- A number of groups provided additional data or other quantitative information that was considered by the study team. Some areas of the report and appendices were revised based upon what was learned.
-



Board Report No. 11-57 — Disparity Study Update  
June 22, 2011

Page 6 of 7

- Questions/concerns about the study approach and alternative methods of analysis brought forward the need to expand and improve the discussion of the approach method.
- Public comment focused primarily on the level of availability.

#### Disparity in City of Portland Contracts

The results of BBC's study were mixed, generally finding some disparity on City and PDC-owned contracts while discovering clear disparity on projects that received PDC funds without direct project management.

There is evidence of disparities in the utilization of MBEs and WBEs when City Fair Contracting programs did not apply (e.g., disparities in the use of MBEs without the Good Faith Effort (GFE) Program).

There are substantial disparities for prime contracts for each MBE group and WBE's. Even with the City's program to encourage MBE/WBE utilization as prime consultants on construction-related professional services contracts there were disparities for WBEs (e.g., women receiving on-call contracts were not utilized as much as other firms receiving such contracts, and many received no work under those contracts at all).

Some issues and suggestions identified in the 1996 study are identified in BBC's study as well (e.g., disparities in prime contracting with MBEs & WBEs, segmentation of large contracts to encourage opportunities, the need for business assistance and access to capital for MBEs and WBEs, relaxing or reducing bonding and insurance requirements).

#### Disparity in PDC Contracts

The study found some disparity on PDC-owned construction contracts and construction and design service professional contracts, although the overall finding was one of little or no disparity. By "owned" we mean that PDC was the contract holder. The more control PDC had over contracts and projects, the greater the participation there was of minority and women contractors.

In contrast, the study found significant disparities existed on construction and professional services contracts that were not owned by PDC but to which PDC had sponsored through resources or funding. For example, public and public-private construction projects in the Portland region can typically have multiple partners and funding sources. These sponsored contracts represent approximately 90% of all PDC contract dollars.

The greatest disparities were in prime contracting and personal services such as engineering and architecture. The disparities for women-owned firms were substantial on both construction and personal services contracts.

During most of the study period, PDC's policy set a 20% Minority/Women/Emerging Small Business (M/W/ESB) goal that only applied to the amount of PDC resources given to the project.

Board Report No. 11-57 — Disparity Study Update  
June 22, 2011

Page 7 of 7

PDC's policy has changed considerably, most recently in spring 2010, and now has a 20% goal based on the total hard cost of construction and factored by availability on an individual project-by-project basis, not just on PDC's contribution.

The disparity study considered business capacity, access, and equity on every project where PDC resources are invested. It also pointed out that the greatest disparities were found in an area where no PDC policy or program applies, such as on the professional services side of sponsored projects.

#### Process and Future Policy Making

During the month-long public comment period, PDC and City leaders and the project team met with the community, the media, and key stakeholders to discuss the findings and the draft report.

The project team is currently working with the Mayor's office, various City bureaus, and the MBE and WBE community to develop strategies to close the disparity gaps identified in the study.

BBC found that the City and PDC should continue to enhance efforts to help all small businesses, regardless of race and gender and that the agencies may want to conduct further research whether certain barriers to MBEs and WBEs can be minimized or removed.

What we learned from the statistical results, the anecdotal evidence, and public comments is that we have legal grounds to continue current equity programs and make appropriate enhancements.

We also have the guidance necessary to close identified gaps in utilization, which means some changes need to be made to PDC and the City's current equity programs.

Additionally, the study provides direction on issues such as bonding, insurance, prequalification, capacity building, access to capital, and other systemic obstacles to the success of minority- and women-owned businesses in Portland.

#### **ATTACHMENTS**

- A. PDC Disparity Study – Executive Summary

## CHAPTER ES.

### Executive Summary

The Portland Development Commission (PDC) and The City of Portland (City) engaged a team led by BBC Research & Consulting (BBC) to study whether their current efforts to promote a “level playing field” for minority- and women-owned firms (MBE/WBEs) in City and PDC contracting were effective and whether other programs are needed. The BBC study team examined the construction and construction-related professional services industries in the Portland metropolitan area.

Throughout the country, a number of groups have filed lawsuits challenging the legality of MBE/WBE programs. Disparity studies are a court-approved method that helps public agencies determine whether there is a need for programs to assist MBEs and WBEs and whether those programs comply with relevant court decisions.

The BBC disparity study follows court guidelines for the collection and analysis of quantitative and qualitative information regarding opportunities for MBEs and WBEs in public contracts and in the local marketplace as a whole. BBC’s methodology was recently reviewed and approved by a court within the Ninth Circuit.<sup>1</sup>

#### What are PDC’s current efforts?

PDC has operated some version of Diversity Programs since 1997. It revised the program in spring 2010. The current Business Equity Program encourages utilization of minority- and women-owned firms on PDC contracts. Although PDC establishes annual aspirational goals for participation of M/W/ESBs, it does not set contract-specific goals.

PDC’s Business Equity Program is similar to the City’s Good Faith Efforts (GFE) Program, which encourages outreach to MBEs, WBEs and other small businesses.

#### What were the key results of the study?

Courts have held that public agencies operating a program that specifically assist minority- and women-owned firms must demonstrate:

1. A strong basis in evidence that discrimination affects minority- and women-owned firms; and
2. That any program adopted is *narrowly tailored* to achieve the goal of remedying the specific identified discrimination. A number of elements determine whether a program is narrowly tailored.

**1. Evidence.** PDC’s current programs have a positive effect on the overall utilization of minority- and women-owned firms on contracts held directly by PDC — a small portion of the total dollars spent by PDC each year. In contrast, utilization of MBE/WBEs on PDC-sponsored contracts was

---

<sup>1</sup> *Associated General Contractors of America, San Diego Chapter v. California Department of Transportation, et al.*

below what might be expected based on the availability analysis, even where programs applied. There were also disparities in the utilization of MBEs and WBEs on PDC contracts when MBE/WBE programs did not apply.

There is also evidence of disparities within the local marketplace.

- Annual revenue of certain MBE groups and WBEs is lower than other firms in the Portland area construction and construction-related professional services industries.
- There is evidence that minorities and women face greater disadvantages than other firm owners when seeking capital, bonding and insurance.
- There is also quantitative and qualitative evidence that MBE/WBEs face barriers to working as prime contractors and as subcontractors on local public sector contracts.
- There is evidence that the current availability of MBEs and WBEs to perform PDC construction and construction-related professional services contracts is less than what might be expected if minorities and women had the same opportunities as non-minorities and men to enter and advance within these industries, and form and grow their businesses.

The disparity study included in-depth personal interviews with local trade associations and business owners, thousands of telephone interviews with business representatives, and oral and written statements from the public. In this research, a number of individuals reported that discrimination affects MBEs and WBEs in the Portland metropolitan area. Some have urged PDC to strengthen its programs that assist minority- and women-owned firms.

PDC will need to assess the results of this disparity study and other information it has to determine an appropriate course of action. Its independent assessment of whether this combined information meets the requirements for MBE/WBE programs is a necessary first step in planning the future of any PDC efforts.

**2. Narrow-tailoring of PDC programs.** Any MBE/WBE program operated by PDC must also be narrowly tailored. Court review of narrow tailoring includes:

- Whether the government agency seriously considered workable race-neutral means to increase minority business participation in contracting (e.g., simplification of bidding procedures, relaxation of bonding requirements and training);
- Limitation of the remedy to only those minority groups for which there is evidence of discrimination in the local area;
- The flexibility and duration of the relief, including the availability of waiver provisions;
- The relationship of numerical goals to the relevant labor market; and
- The impact of race-, ethnicity-, or gender-conscious remedies on the rights of third parties.

In sum, PDC should only implement those programs to assist minority- and women-owned firms that are necessary to remedy any effects of identified discrimination. If neutral measures like small business assistance efforts alone would be an adequate remedy, courts would not consider race- and gender-based programs to be narrowly-tailored.

The BBC study team reviewed PDC's current efforts to assist small businesses in general ("neutral programs") plus a wide range of changes to PDC policies and potential new PDC programs to assist all small businesses. In addition, the study team examined ways to strengthen or add to programs that assist minority- and women-owned firms.

Individuals participating in the public forum and providing other comments have given considerable input as part of the disparity study process. Many urged stronger actions to open more PDC contracting opportunities to minority- and women-owned businesses. Some individuals indicated that past PDC programs have not been successful in building a strong core of minority- and women-owned firms that can compete for PDC and other work without assistance. Some individuals said that the PDC should not have MBE/WBE programs. (Appendix J of the report includes this information.)

The information collected in this study supports stronger PDC action to remove barriers to MBE/WBE participation in its contracts, foster more contract opportunities for MBE/WBEs, and help to build a strong minority- and women-owned business community in the Portland area. Although past PDC initiatives have had a positive effect on MBEs and WBEs, there are substantial opportunities for improvement and expansion of such efforts. PDC will need to determine whether this is solely done through neutral programs or whether continued or stronger programs that specifically assist MBE/WBEs are also needed.

**Continuation and expansion of neutral efforts.** The BBC study team suggests PDC consider the following continued or new efforts (alone or in combination with MBE/WBE programs):

- Continued support for workforce and hiring programs that help to open doors for groups underrepresented in the construction industry (see Chapter 10, page 1);
- Continued support of technical assistance services (Chapter 10, page 2);
- Either support for the Port of Portland's mentor-protégé program or a new program (Chapter 10, page 3);
- Serving as a referral source for existing small business finance and capital assistance programs (Chapter 10, page 3);
- Continued outreach and other support for local organizations by attending events, referring businesses and sponsoring programs (Chapter 10, page 3);
- Serving as a referral source for local business incubators and possibly financially supporting one or more business incubators (Chapter 10, page 4);
- Encouraging more subcontracting on PDC contracts (minimum subcontracting program similar to a City of Los Angeles program as discussed on page 4 of Chapter 10);
- A requirement to evaluate when contracts can be divided into multiple smaller contracts (Chapter 10, page 5);

- Consider implementing an alternative contracting method similar to the method used on some City construction contracts (Chapter 10, page 5);
- Strong enforcement of prime contractor prompt payment to subcontractors (Chapter 10, page 5);
- Comprehensive collection of prime contract and subcontract information on sponsored project (Chapter 10, page 6);
- Notification of bid opportunities and PDC resources (Chapter 10, page 6);
- Possible implementation of a Minority Evaluator Program (Chapter 10, page 6);
- Partnering with other local government agencies and private firms to host a construction management or engineering institute (Chapter 10, page 7); and
- Launching an online training program for firms (Chapter 10, page 7).

Each of the above initiatives can be designed to be race- and gender-neutral, and many are in place at PDC.

**Initiatives to minimize or remove barriers created by bonding and insurance requirements.**

Bonding and insurance requirements on PDC contracts present barriers for all small businesses, particularly minority- and women-owned firms. Chapter 10 of the report examines a number of ways PDC could lessen the negative impact of bonding and insurance requirements, including relaxing or waiving bonding and insurance requirements when possible.

**Changes to the Business Equity Program.** The City GFE Program, which is very similar to the PDC Business Equity Program, appears to effectively address potential disparities in the use of MBE and WBE subcontractors on City construction contracts. The PDC Business Equity Program appears to be less effective in addressing potential disparities in the utilization of MBE subcontractors on owned construction contracts. There is also evidence of disparities in prime contractors' use of MBE/WBE subcontractors for PDC-sponsored construction projects. Chapter 10 explores future program options.

**New programs for prime contractors.** PDC might consider other programs to strengthen MBE/WBE prime contractors. Chapter 10 reviews the City of Atlanta's joint venture program as one example of such a program.

**Who performed the disparity study?**

BBC is a Denver-based economic research firm that is one of the leading disparity study consultants in the United States, having conducted nearly 80 disparity studies since 1989. In addition to BBC, the study team included:

- **Holland & Knight LLP (H&K)**, a national law firm with offices in Portland;
- **Group AGB, Ltd.**, a Portland-based consulting firm.
- **F.M. Burch & Associates, Inc. (FMBA)**, a Portland-based consulting firm.
- **Montesi & Associates**, a Portland-based consulting firm.
- **Customer Research International (CRI)**, a Texas-based survey research firm.



Group AGB, FMBA, Montesi & Associates and CRI are all MBEs or WBEs. Chapter 1 of the report provides more information about the study team.

### **Did interested groups and the general public have an opportunity to provide input?**

BBC began the assignment in fall 2009 and presented a draft report to the PDC in January 2011. In 2010, the BBC study team interviewed 60 representatives of trade associations, business owners and managers, and other groups. The study team also contracted thousands of firms by telephone to give them an opportunity to provide their experiences attempting to perform work with the City, PDC and in the local marketplace.

- During the course of the study, BBC, the City and PDC regularly met with an advisory group comprised of representatives of minority-, women- and majority-owned contractors and consultants and local trade associations.<sup>2</sup>
- In April 2011, the City and PDC provided a draft report to the public for review and held a public forum where interested individuals provided input. The agencies also provided an online venue for written comments from the public.

The BBC study team reviewed the testimony from the public forum, written comments and other input received by the City and PDC prior to preparing the final report in June 2011. A number of the comments appear in Appendix J of the full report. The study team made a number of other additions and clarifications based on review of the comments, including substantial modifications to this Executive Summary.

### **What does a disparity study include?**

Because these types of studies include analyses of whether there is a *disparity* between the utilization and availability of MBEs and WBEs, they are often referred to as *disparity studies*. For this study, minority-owned and women-owned firms will be referred to as MBEs and WBEs respectively regardless of certification status. It will be noted in the text when discussing certified firms specifically.

- “Utilization” refers to the percentage of contract dollars that went to MBE/WBEs during the study period.
- “Availability” refers to the percentage of contract dollars that one might expect to go to MBE/WBEs given the number of MBE/WBEs available for specific types and sizes of prime contracts and subcontracts.

BBC included both certified and non-certified MBE/WBEs in the utilization and availability results so that the disparity analysis would pertain to any potential barriers related to race, ethnicity or gender of the business owner.<sup>3</sup> To further isolate the possible effects of race/ethnicity versus gender, “WBEs” refers to white women-owned firms in this disparity study. Firms owned by minority women are included in the utilization and availability results for MBEs (see Chapter 5 of this report for more detail about why BBC classifies WBEs in this way).

<sup>2</sup> The term “majority-owned firms” refers to firms not owned by minorities or women.

<sup>3</sup> If the disparity analysis were conducted based only on currently certified MBEs and WBEs, conclusions could not be drawn about the effectiveness or need for programs to assist all MBE/WBEs.

- To perform the utilization analysis, the BBC study team compiled and analyzed data on more than 5,000 prime contracts and subcontracts on PDC-owned or -sponsored contracts between July 2004 through June 2009. The study team examined the types of work involved, size of the contract or subcontract, year of the contract and what PDC programs applied.
- In the availability analysis, the study team successfully contacted more than 3,700 local firms doing business in relevant subindustries to discuss whether they were qualified and interested in PDC-related work, the types of work they conduct, sizes of contracts they perform and other firm characteristics.
- BBC compared utilization of MBE/WBEs on PDC contracts with the dollars those firms might be expected to receive based on their availability for those types and sizes of prime contracts and subcontracts.

BBC also analyzed PDC contracting processes, local marketplace conditions and potential business assistance programs. As part of those analyses, the study team developed statistical models using U.S. Census data and other information on the local marketplace; compiled and analyzed bids and proposals on PDC contracts; performed telephone interviews with thousands of local businesses; and conducted in-depth personal interviews with 60 business owners, trade associations and other individuals knowledgeable about local marketplace conditions.

#### **How was the availability analysis performed?**

The BBC study team made extensive efforts to contact local firms for specific types of PDC construction and personal services work. The study team contacted firms using a telephone survey and discussed whether they were qualified and interested in PDC work, the types of work they conduct, sizes of contracts they perform and other firm characteristics.

- Not all firms reported qualifications and interest in PDC work.
- A business that did express qualifications and interest in PDC work was typically only available for certain types and sizes of PDC-owned or -sponsored prime contracts and subcontracts. For example, a business might have only been in operation for a portion of the July 2004 through June 2009 study period and thus only would have been available for certain years of contracts.
- BBC determined overall availability by examining the number of MBEs and WBEs available for each prime contract and subcontract in proportion to the total number of firms available for that prime contract or subcontract.<sup>4</sup>

---

<sup>4</sup> For example, if BBC examined a \$50,000 electrical subcontract in 2009, only firms indicating that they were qualified and interested in PDC work as a subcontractor, had performed or bid on similar work in the past in the Portland area, had bid on or performed work of that size, and were in business in 2009 were counted as available for that work. (All of this information was collected from each firm by telephone in the availability interviews.) If 100 firms in the BBC availability database met those criteria, and 10 were minority-owned, MBE availability for that subcontract would be 10 percent. These results were weighted by the size of subcontract and combined with all of the other results for each PDC prime contract and subcontract to determine overall availability.

- Contract-by-contract availability results were then aggregated on a dollar-weighted basis to determine the overall percentage of PDC-owned and PDC-sponsored contract dollars that might be expected to go to MBE/WBEs.

For a number of reasons, the availability analysis did not capture every firm potentially available for PDC construction and personal services prime contracts and subcontracts. The availability analysis produced a statistically reliable availability benchmark for use in determining whether there were disparities in PDC's utilization of MBEs and WBEs.

The accuracy of availability benchmarks (dollar-weighted percentage availability) — not the size of the availability database developed as part of this study — was most important in the disparity study. The availability data allowed BBC to develop a representative depiction of firms qualified and interested in PDC work, but it should not be considered an exhaustive list of every minority-, woman- and majority-owned firm that could participate on a PDC project. Reasons for this include the following:

- BBC designed the availability analysis to be independent of any PDC, City or other agency list of companies that perform construction and personal services work. Such lists might be too limiting because certain firms that are qualified and interested in City or PDC contracts might have been discouraged from such public sector work in the past. It was important to include those firms in the availability database. Because BBC did not use PDC and City lists to develop the availability database, there might be some firms that have worked on PDC contracts that were not included in the availability analysis.
- The availability analysis requires data about MBE/WBEs and majority-owned firms on an apples-to-apples basis. Therefore, all firms, regardless of race/ethnicity/gender ownership, must be identified from a consistent source. For example, certification lists for MBEs, WBEs and ESBs could not be used as the source of the availability database when no similar lists exist for non-certified or majority-owned firms.
- BBC purchased names and contact information of certain types of construction and personal services firms located in the Portland area from Dun & Bradstreet (D&B) Marketplace. The study team then contacted those firms to collect information about those firms for the availability analysis. D&B Marketplace represents the most consistent, comprehensive database of firms that can be used in disparity study research, and its application in availability analysis has been accepted in court decisions. Even though D&B strives to include every firm doing business in the United States in its Marketplace database, it does not capture every company.
- In terms of dollars, most PDC construction and personal services prime contracts and subcontracts go to firms located in the Portland Metropolitan Area. Only firms within this area were included in the availability analysis, consistent with guidance from relevant case law. In addition, BBC only conducted availability interviews with firms performing the types of construction or personal services work that comprised most PDC prime contract and subcontracts. Therefore, only local businesses and firms that perform work within the core areas of PDC projects are included in the availability database.

- BBC's availability methodology required information from firms that could only be received through interviews. Only businesses that agreed to participate in an interview are included in the availability database.
- The BBC study team was unable to reach every firm in the D&B Marketplace list, even after repeated attempts to contact an individual at the business who could complete an interview. Only firms that had working phone numbers, answered their phone and made individuals available for an interview are included in the availability database.
- BBC researched whether firms that were not reached were disproportionately MBE/WBEs. Using D&B data and using State MBE/WBE certification data, relatively few of these firms appeared to be minority- or women-owned. This was also true for firms declining to participate in interviews.

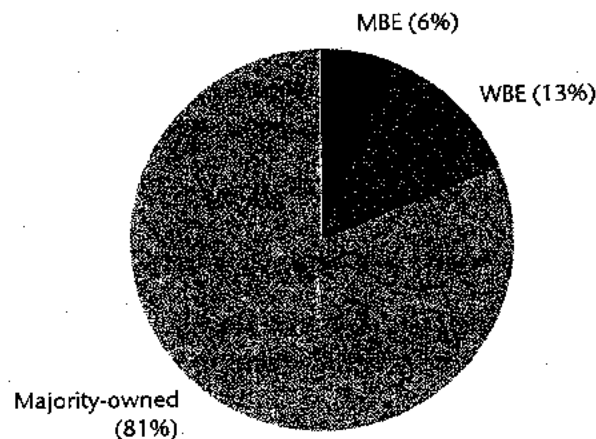
BBC developed valid availability benchmarks for use in the PDC disparity study based upon review of court decisions that have reviewed such analyses. However, the above points are important to remember when considering other uses of the availability database developed as part of the disparity study.

**Of the firms available for PDC construction and personal services work, what share are minority- or women-owned?**

Of the firms successfully interviewed that reported qualifications, interest and other characteristics indicating that they were available for certain PDC construction and personal services contracts, 6 percent were MBEs<sup>5</sup> and 13 percent were WBEs. In total, nearly one in five firms available for PDC construction and personal services prime contracts or subcontracts were MBE or WBE firms.

**Figure ES-1.  
Available firms by  
ownership classification**

Source:  
BBC Research & Consulting from 2010  
Availability Survey.



<sup>5</sup> For purposes of this study, "minority" follows the definitions from the State of Oregon's MWESB Program: African Americans, Asian-Pacific Americans, Subcontinent Asian Americans, Hispanic Americans and Native Americans.

These results are based on research with firms in the Portland metropolitan area available for PDC construction and personal services contracts, including identification of the race/ethnicity/gender of ownership of those firms.<sup>6</sup>

BBC's study went beyond lists of firms certified by the State of Oregon or others when counting firms as MBEs or WBEs. To determine race/ethnicity/gender of ownership, the BBC study team contacted firms potentially available to perform relevant PDC work and conducted detailed phone interviews with business owners and managers.

Availability interviews focused on the subindustries of construction and personal services most related to PDC construction and personal services contracts. More than 3,700 firms were successfully contacted, about 1,500 of which reported qualifications, interest and other characteristics that indicated availability for PDC prime contracts and subcontracts.

Chapter 5 and Appendix D of this report provide additional results and documentation of the availability analysis.

**What percentage of PDC construction and personal services contract dollars might be expected to go to MBE/WBEs?**

Based on the information collected in telephone interviews with local firms, and a review of PDC-owned and PDC-sponsored construction prime contracts and subcontracts from July 2004 through June 2009, the percentage of PDC construction contract dollars expected to go to MBE/WBEs is as follows:

- For MBEs, 4.6 percent of sponsored contracts and 5.7 percent of owned contracts; and
- For WBEs, 7.3 percent of sponsored contracts and 7.4 percent of owned contracts.<sup>7</sup>

Similar analyses of PDC personal services contracts, including review of more PDC-owned and -sponsored contracts and subcontracts, indicated availability as follows:

- For MBEs, 4.9 percent of sponsored contracts and 5.1 percent of owned contracts; and
- For WBEs, 4.8 percent of sponsored contracts and 11.2 percent of owned contracts.<sup>8</sup>

These dollar-weighted availability figures are lower than what is indicated from a simple "headcount" of MBEs, WBEs and majority-owned firms because relatively fewer MBEs and WBEs are available for the largest prime contracts.

---

<sup>6</sup> Among the subindustries included in the utilization analysis, 97 percent of contract dollars went to vendors with locations in the Portland Metropolitan Statistical Area. Defined by the Census Bureau, the Portland Metropolitan Statistical Area includes the Oregon counties Clackamas, Columbia, Multnomah, Washington and Yamhill and the Washington counties Clark and Skamania.

<sup>7</sup> Additional detail on construction utilization (including information about subcontractor and prime contractor utilization) can be found in Chapter 6.

<sup>8</sup> Additional detail on personal services utilization (including information about subcontractor and prime contractor utilization) can be found in Chapter 7.

BBC also developed availability estimates for specific MBE groups and for specific subsets of PDC-owned and -sponsored prime contracts and subcontracts. These values serve as benchmarks to evaluate the actual percentage of contract dollars going to those firms.

**Was there a disparity between utilization and availability of MBEs and WBEs on PDC construction and personal services contracts?**

PDC's Business Equity Program applied to certain owned and sponsored contracts. PDC utilization of MBE/WBEs on owned contracts was close to or exceeded what might be expected based on the availability of MBEs and WBEs for those prime contracts and subcontracts. In contrast, utilization of MBE/WBEs on sponsored contracts was below what might be expected based on the availability analysis.

**Owned contracts.** Overall utilization of MBE/WBEs on PDC-owned contracts was close to or exceeded availability for those contracts. However, PDC's utilization of MBEs fell short of availability on owned construction contracts. As shown in Figure ES-2, MBEs received 4.0 percent of the dollars on PDC-owned construction contracts, which is less than the 6.0 percent that might be expected based on MBE availability for that work. There were substantial disparities for each MBE group except for Asian-Pacific American-owned firms.<sup>9</sup>

The PDC Business Equity Program that applied to these construction contracts requires prime contractor outreach to subcontractors that are certified MBEs, WBEs or ESBs, which include firms owned by non-minority men. It appears that the Business Equity Program primarily benefited majority-owned ESB and WBE subcontractors on these contracts:

- Majority-owned ESBs received 21 percent of subcontract dollars;
- WBEs received 21 percent of subcontract dollars;
- MBEs received 3 percent of subcontract dollars; and
- The balance of subcontract dollars went to majority-owned firms that were not ESB-certified.

---

<sup>9</sup> Based upon a number of court decisions (see Chapter 2 and Appendix B), a "substantial disparity" is one where utilization is less than 80 percent of what might be expected based on availability.



**Figure ES-2.**  
**Utilization and availability**  
**of MBE/WBEs on PDC-**  
**owned and -sponsored**  
**contracts, July 2004–June**  
**2009**

**Note:**

"WBE" refers to white women-owned firms.

**Source:**

BBC Research & Consulting.

	Utilization	Availability	Disparity
<b>PDC-owned contracts</b>			
<b>Construction</b>			
MBE	4.0 %	6.0 %	Yes
WBE	17.0	10.1	No
<b>Personal services</b>			
MBE	9.8 %	5.1 %	No
WBE	11.1	11.2	No
<b>PDC-sponsored contracts</b>			
<b>Construction</b>			
MBE	3.2 %	4.8 %	Yes
WBE	5.9	7.5	Yes
<b>Personal services</b>			
MBE	1.3 %	4.9 %	Yes
WBE	0.1	4.8	Yes

**Sponsored contracts.** Unlike PDC-owned contracts, there were large disparities between the utilization and availability of MBE/WBEs on PDC-sponsored construction and personal services contracts.

As Figure ES-2 illustrates, MBEs received 3.2 percent of PDC-owned construction contract dollars during the study period, which is less than the 4.8 percent MBE availability figure for those contracts. Utilization of WBEs (5.9%) was also less than availability (7.5%).

About 1 percent of PDC-sponsored personal services contract dollars went to MBEs, less than what might be expected based on availability. Only one-tenth of 1 percent of sponsored personal services contract dollars went to WBEs, also below availability for those contracts.

Chapter 6 of the disparity study report provides detailed results of the utilization and disparity analyses for PDC construction contracts. Chapter 7 examines utilization and disparity results for PDC personal services contracts. Chapter 8 further explores potential explanations for identified disparities. The study team explains methods for compiling and analyzing PDC contract data in Chapter 3 and Appendix C.

**Was utilization below availability for each MBE group on PDC-sponsored contracts?**

For PDC-sponsored construction contracts (including prime contracts and subcontracts), utilization of African American- and Asian-Pacific American-owned firms exceeded availability, as discussed in Chapter 6. Utilization of Subcontinent Asian American-, Hispanic American- and Native American-owned firms was below availability for those firms.

Utilization of African American-owned firms exceeded availability for PDC-sponsored personal services contracts (when considering both prime contract and subcontracts). For all other MBE groups, utilization on PDC-sponsored personal services contracts was below what might be expected based on availability (see Chapter 7).

### **How could PDC's Business Equity Program influence PDC sponsored projects?**

Certain evidence of disparities includes:

- PDC contributes funding or land to many major construction contracts in Portland. Prime contractors for those projects are selected by the developer or other project owner — not PDC. When examining prime construction contract dollars for PDC-sponsored contracts, BBC found MBE/WBE utilization of less than one-half of 1 percent. There were substantial disparities between MBE/WBE utilization and availability (see Chapters 6).
- Although PDC applies a Business Equity Program to contracts on PDC-sponsored construction projects, there were substantial disparities for WBEs and certain MBE groups as subcontractors on those contracts (see Chapters 6).

PDC's Business Equity Program did not apply to construction-related professional services contracts on PDC-sponsored projects. The study team's analysis of PDC-sponsored construction-related professional services contracts identified disparities in the use of MBEs and WBEs:

- Only 1.5 percent of prime consultant dollars on PDC-sponsored projects went to MBE/WBEs, substantially below what might be expected based on availability of those firms for that work. There were substantial disparities for WBEs and each MBE group except for African American-owned firms (see Chapter 7).
- MBE/WBEs received 1 percent of subcontract dollars on PDC-sponsored personal services contracts. There were substantial disparities between utilization and availability for every MBE/WBE group (see Chapter 7).

### **Does the utilization reported in the disparity study match the utilization reported in PDC's annual reports?**

During the study period, PDC released yearly reports on utilization of M/W/ESBs in PDC contracting. The results reported in the disparity study may differ from the data presented in PDC's utilization reports. There are several reasons for these differences:

- **MBE/WBE certified firms.** To calculate MBE/WBE utilization for annual utilization reports, PDC considered only those firms that are certified as such through the State of Oregon. To calculate MBE/WBE utilization for the disparity study, BBC considered certified and non-certified MBE/WBEs.
- **Contract amount.** The study team calculated participation of minority- and women-owned firms as a percentage of the entire contract amount, not just the PDC contribution. Some of the PDC annual reports calculated utilization as a percentage of the PDC contribution to projects, attributing all MBE/WBE participation to the PDC portion of the project.
- **Time period.** The disparity study aggregates results across a five year time period (July 2004 through June 2009).

- **Subcontractor data.** During the study period, PDC tracked subcontractor participation on construction contracts. BBC collected subcontractor participation on personal services contracts.
- **Excluded subindustries.** BBC excluded certain PDC contracts based on subindustry, including those that are not typically included in a disparity study (e.g., contracts going to not-for-profit organizations) and those that reflect national markets (e.g., software).
- **South Waterfront projects.** Projects related to the South Waterfront were included in the study and the annual report. In the annual report, however, these projects were reported separately from other PDC projects.

#### How do results for PDC contracts compare with disparity results for the City?

About 2.9 percent of City construction contract dollars went to MBEs from July 2004 through June 2009. Utilization of WBEs on City construction contracts was 5.4 percent during the study period. For City construction-related professional services contracts, utilization of MBEs was 28 percent and utilization of WBEs was 6.8 percent.<sup>10</sup> Utilization of MBE/WBEs on City construction and construction-related professional services contracts was close to or exceeded what might be expected based on availability for those contracts. Figure ES-3 provides an overview of disparity indices for PDC and City contracts. A disparity index of 100 indicates parity between utilization and availability. Disparity indices less than 100 indicate that utilization was less than what might be expected based upon availability for those contracts (indices under 80 indicate “substantial disparity” according to some court decisions).

**Figure ES-3.**  
Summary of disparity  
indices for City and PDC  
contracts (disparity index  
of 100 means parity).

**Note:**

Individual disparity indices for MBE groups may differ from the aggregate MBE index. See Chapter 6 & 7 of the City and PDC reports.

A disparity index of “100” indicates an exact match between actual utilization and the availability for that group (also referred to as “parity”).

**Source:**

BBC Research & Consulting.

	MBE	WBE
<b>City</b>		
Construction	150	152
Personal/professional services	200 +	93
<b>PDC-owned</b>		
Construction	74	200 +
Personal/professional services	190	98
<b>PDC-sponsored</b>		
Construction	69	76
Personal/professional services	27	2

**Overview of City of Portland disparity results.** The BBC study team was able to compile and – analyze data for certain groups of City of Portland contracts and subcontracts for which programs to encourage MBE/WBE utilization did not apply. There is strong evidence that, without City programs, there would be disparities in the utilization of MBE/WBEs on City construction and construction-related professional services contracts.

<sup>10</sup> The City of Portland Disparity Study examined City professional, technical and expert services (PTE) contracts.

- There were substantial disparities in the utilization of MBEs as prime contractors on City construction contracts (see Chapter 6).
- Considering subcontracts on formal construction contracts not awarded under the Fair Contracting Programs (including the City's Good Faith Efforts Program and Sheltered Market Program), MBE/WBE utilization was 12.8 percent, substantially below the 19.8 percent MBE/WBE availability for those subcontracts (see Chapter 6).

Even with the City's program to encourage MBE/WBE utilization as prime consultants on construction-related professional services contracts, there were disparities for WBEs.

**How do results for PDC contracts compare with results for the Portland area marketplace?**

BBC also examined quantitative and qualitative information about the success of MBE/WBEs in the local construction and personal services industries.

- Annual revenue of certain MBE groups and WBEs is lower than other firms in the Portland area.
- There is evidence that minorities and women face greater disadvantages than other firm owners when seeking capital, bonding and insurance.
- There is also quantitative and qualitative evidence that MBE/WBEs face barriers to working as prime contractors and as subcontractors on local public sector contracts.

Chapter 4 and Appendices G, H, I and J present these analyses.

**Is there any evidence that availability of MBE/WBEs in the local marketplace has been affected by race or gender discrimination?**

BBC also examined quantitative and qualitative information about any barriers that could affect minorities and women entering the local construction and personal services industries.

- There is quantitative and qualitative evidence that availability of MBE/WBEs to perform PDC construction and personal services contracts is less than what might be expected if minorities and women had the same opportunities as non-minorities and men to enter and advance within these industries, and form and grow their businesses.
- Perhaps contributing to the disparities in business ownership, there is evidence that minorities and women have greater disadvantages than other firm owners when seeking capital.

Chapter 4 and Appendices E, F, G, H, I and J present these analyses.

**How should PDC use this information?**

PDC should review the results from the disparity study when considering its future operation of any small business and MBE/WBE programs. In addition to the disparity study and its own internal research, PDC has access to other relevant information, including results of disparity studies for other agencies in Oregon.

Some of the information included as part of the disparity study may prompt PDC to further research how programs might be more strongly implemented for its sponsored contracts. Efforts to help all small businesses ("race- and gender-neutral" measures) should continue to be an important component of PDC's programs. Chapter 10 explores several initiatives for PDC to consider.

As PDC considers the future of its MBE/WBE/ESB assistance programs, it should not only review whether there is a need for such programs but also the legal requirements for "narrow-tailoring" those programs (see Chapter 2 and Appendix B).



Economic Prosperity for All

ABOUT

INITIATIVES

STRATEGIES

DATA & REPORTS

NEWS



# PEOPLE

RECRUIT, DEVELOP, AND  
ADVANCE THE REGION'S  
TALENT

## PRIORITIES

- Activate industry in training and education to advance career and technical education
- Own, practice, and perfect diversity
- Close the income gap in underrepresented, disadvantaged populations

## WHAT WE'RE AIMING FOR

- A workforce fully prepared to advance Greater Portland's target sectors and innovative businesses





Economic Prosperity for All

ABOUT

INITIATIVES

STRATEGIES

DATA & REPORTS

NEWS

VIEW COMPETITIVENESS INDICATORS

CONTACT US

info@greaterportland2020.com | (503) 445-8065 | © 2016 Greater Portland  
Inc

**MARCH 25, 2015**

**PORTLAND CITY COUNCIL AGENDA  
City Hall - 1221 SW Fourth Avenue  
WEDNESDAY, 9:30 AM, MARCH 25, 2015**

THOSE PRESENT WERE: Mayor Hales, Presiding; Commissioners Fritz, Novick and Saltzman, 4.

**Disposition:****COMMUNICATIONS**

- 289** Request of Carl Wikman to address Council regarding Portland Bureau of Transportation maintenance of Cedar Crossings Bridge (Communication)

**PLACED ON FILE**

- 290** Request of Hector Lara Cervantes to address Council regarding illegal operation and charges of treason in the state (Communication)

**PLACED ON FILE**

- 291** Request of Neal Walker to address Council regarding interactions with Portland Police (Communication)

**PLACED ON FILE**

- 292** Request of Benjamin Barber to address Council regarding gender discrimination, segregation and the change to Oregon Constitution (Communication)

**PLACED ON FILE**

- 293** Request of Annie Neal to address Council regarding Multnomah County Family Violence Coordination Council request for continued support for Portland Police Family Services Division (Communication)

**PLACED ON FILE****TIMES CERTAIN**

- 294** **TIME CERTAIN: 9:30 AM** – Accept the City of Portland Comprehensive Annual Financial Report for FY Ended June 30, 2014 (Report introduced by Mayor Hales) 10 minutes requested

**Motion to accept the report:** Moved by Novick and seconded by Saltzman.

(Y-4)

**ACCEPTED**

- 295** **TIME CERTAIN: 10:00 AM** – Accept the audit of the City Comprehensive Annual Financial Report for FY 2013-2014 and the related Communications with Those Charged with Governance, and adopt the management response to correct the deficiency in financial reporting controls disclosed in the audit (Resolution introduced by Auditor Hull Caballero) 20 minutes requested

**Motion to accept the report:** Moved by Fritz and seconded by Saltzman.

(Y-4)

**37116**

MARCH 25, 2015

<p><b>*296 TIME CERTAIN: 10:15 AM</b> – Approve Innovation Funding for 17 micro-grant proposals for FY 2014-15 (Ordinance introduced by Mayor Hales) 30 minutes requested</p> <p>(Y-4)</p>	<p><b>187056</b></p>
<p><b>297 TIME CERTAIN: 10:45 AM</b> – Appeal of Northwest District Association against Design Commission's decision to approve with conditions the Tess O'Brien Apartments at 1953 NW Overton and 1950 NW Pettygrove Streets (Previous Agenda 250; Adopt Findings; LU 14-220722 DZ AD) 5 minutes requested</p> <p><b>Motion to deny appeal of Northwest District Association and uphold the Design Commission's conditional approval:</b> Moved by Fritz and seconded by Novick.</p> <p>(Y-4)</p>	<p><b>FINDINGS ADOPTED</b></p>
<p><b>298 TIME CERTAIN: 11:00 AM</b> – Approve the Eleventh Amendment to the Central Eastside Urban Renewal Plan to add plan area and projects, extend the duration of the Plan and increase the maximum indebtedness (Second Reading Agenda 268; Ordinance introduced by Mayor Hales) 1 hour requested for items 298-303</p>	<p><b>PASSED TO SECOND READING APRIL 1, 2015 AT 9:30 AM</b></p>
<p><b>299</b> Approve the termination of the Education Urban Renewal Area Plan (Second Reading Agenda 269; Ordinance introduced by Mayor Hales)</p>	<p><b>PASSED TO SECOND READING APRIL 1, 2015 AT 9:30 AM</b></p>
<p><b>300</b> Adopt the Fourth Amendment to the North Macadam Urban Renewal Plan to add to the plan area, add projects and extend the time frame of the Plan (Second Reading Agenda 270; Ordinance introduced by Mayor Hales)</p>	<p><b>PASSED TO SECOND READING APRIL 1, 2015 AT 9:30 AM</b></p>
<p><b>301</b> Approve the Eleventh Amendment to the Airport Way Urban Renewal Plan to reduce plan area by approximately 970.5 acres (Second Reading Agenda 271; Ordinance introduced by Mayor Hales)</p>	<p><b>PASSED TO SECOND READING APRIL 1, 2015 AT 9:30 AM</b></p>
<p><b>302</b> Approve the Second Amendment to the Willamette Industrial Urban Renewal Plan to cease collections of tax increment (Second Reading Agenda 272; Ordinance introduced by Mayor Hales)</p>	<p><b>PASSED TO SECOND READING APRIL 1, 2015 AT 9:30 AM</b></p>
<p><b>303</b> Approve the Fourth Amendment to the Amended and Restated River District Urban Renewal Plan to reduce plan area by approximately 36.4 acres (Second Reading Agenda 273; Ordinance introduced by Mayor Hales)</p>	<p><b>PASSED TO SECOND READING APRIL 1, 2015 AT 9:30 AM</b></p>
<p><b>CONSENT AGENDA – NO DISCUSSION</b></p> <p><b>Commissioner Amanda Fritz</b></p> <p><b>Position No. 1</b></p> <p><b>Portland Parks &amp; Recreation</b></p>	

MARCH 25, 2015

- \*304** Authorize the acquisition of 2.92 acres of real property on N Crawford for \$880,000 to be used for Park purposes (Ordinance)
- Motion to replace directive e to comply with City financial procedures regarding operations and maintenance costs:**  
Moved by Fritz and seconded by Saltzman. (Y-4)

**187057**  
AS AMENDED

- \*305** Authorize an agreement with American Healthways Services, LLC to promote the use of Portland Parks and Recreation fitness facilities to seniors (Ordinance)
- (Y-4)

**187053**

**Commissioner Nick Fish**

**Position No. 2**

**Bureau of Environmental Services**

- \*306** Authorize a Joint Funding Agreement with the U.S. Geological Survey, U.S. Department of the Interior to update the 100-year floodplain for Crystal Springs Creek in the amount of \$19,800 (Ordinance)
- (Y-4)

**187054**

**Commissioner Dan Saltzman**

**Position No. 3**

**Portland Housing Bureau**

- 307** Authorize Intergovernmental Agreement with Multnomah County for \$67,796 to share costs of a Home for Everyone Initiative Director (Ordinance)

**PASSED TO  
SECOND READING  
APRIL 1, 2015  
AT 9:30 AM**

- 308** Amend subrecipient contract with Cascade AIDS Project to add \$5,000 to integrate health and housing data systems for People Living with HIV/AIDS (Second Reading 285; amend Contract No. 32000664)
- (Y-4)

**187055**

**REGULAR AGENDA**

**Mayor Charlie Hales**

**Bureau of Police**

- \*309** Extend contract with Xerox State and Local Solutions, Inc. for the Red Light Camera System and increase the not to exceed amount by \$1,000,000 (Ordinance; amend Contract No. 31000128) 10 minutes requested
- (Y-4)

**187058**



MARCH 25, 2015

<p><b>*310</b> Extend contract with Xerox State and Local Solutions, Inc. for the Photo Radar System and increase the not to exceed amount by \$3,500,000 (Ordinance; amend Contract No. 31000129) 10 minutes requested</p> <p>(Y-4)</p>	<p><b>187059</b></p>
<p style="text-align: center;"><b>Office of Management and Finance</b></p> <p><b>*311</b> Establish the authority of the Director of the Bureau of Internal Business Services regarding the Portland Oregon <sup>TM</sup> sign and correctly reflect the organizational structure of the Office of Management and Finance (Previous Agenda 286; amend Code Sections 3.15.010, 3.15.020, 3.15.040, 3.15.070, 3.15.080)</p> <p>(Y-4)</p>	<p><b>187060</b></p>
<p><b>312</b> Authorize third issuance of general obligation bonds for fire vehicles and emergency response infrastructure and general obligation refunding bonds (Second Reading Agenda 287)</p> <p>(Y-4)</p>	<p><b>187061</b></p>
<p style="text-align: center;"><b>Commissioner Amanda Fritz</b></p> <p style="text-align: center;"><b>Position No. 1</b></p> <p style="text-align: center;"><b>Portland Parks &amp; Recreation</b></p> <p><b>*313</b> Approve findings and authorize exemptions to competitive bidding requirements, waive performance and payment bonds, authorize an agreement with Rose City Baseball, LLC and authorize Portland Parks and Recreation funding, all in connection with the Walker Stadium at Lents Park Project (Ordinance) 10 minutes requested</p> <p>(Y-4)</p>	<p><b>187062</b></p>
<p style="text-align: center;"><b>Commissioner Nick Fish</b></p> <p style="text-align: center;"><b>Position No. 2</b></p> <p style="text-align: center;"><b>Bureau of Environmental Services</b></p> <p><b>314</b> Authorize a contract with the lowest responsible bidder for the construction of the Balch Consolidated Conduit Support Project No. E09017 for \$1,800,000 (Ordinance) 10 minutes requested</p>	<p style="text-align: center;"><b>PASSED TO SECOND READING APRIL 1, 2015 AT 9:30 AM</b></p>
<p style="text-align: center;"><b>Commissioner Dan Saltzman</b></p> <p style="text-align: center;"><b>Position No. 3</b></p> <p style="text-align: center;"><b>Portland Housing Bureau</b></p> <p><b>*315</b> Authorize sale of land at 815 NW Naito Parkway to Union Station B, LLC for approximately \$8.8 million to be credited to the affordable housing set aside budget in the Downtown Waterfront Urban Renewal Area (Ordinance)</p> <p>(Y-4)</p>	<p><b>187063</b></p>

MARCH 25, 2015

<p style="text-align: center;"><b>Commissioner Steve Novick</b> <b>Position No. 4</b> <b>Bureau of Transportation</b></p> <p><b>*316</b> Authorize grant applications to the Oregon Department of Transportation All Roads Transportation Safety Program for \$2.8 million for the transportation safety projects (Ordinance) 10 minutes requested (Y-4)</p>	<b>187064</b>
<p><b>*317</b> * Increase contract with Tice Electric, Inc. in the amount of \$85,251 to execute Change Order No. 1 for construction of a left turn signal from N Fremont St westbound to N Vancouver Ave southbound (Ordinance; amend Contract No. 30004358; C-10047) 10 minutes requested</p> <p><b>Motion to clarify change order amount and total authorized contract amount as stated in Bureau of Transportation 3-23-15 memo:</b> Moved by Novick and seconded by Fritz. (Y-4)</p>	<b>187065</b> AS AMENDED
<p style="text-align: center;"><b><u>WEDNESDAY, 2:00 PM, MARCH 25, 2015</u></b></p> <p>THOSE PRESENT WERE: Mayor Hales, Presiding; Commissioners Fritz, Novick and Saltzman, 4.</p>	
<p><b>318 TIME CERTAIN: 2:00 PM</b> – Prohibit the use and purchase of neonicotinoid pesticides by the City of Portland; amend Integrated Pest Management strategies; and urge retailers operating within the City to label plants, seeds and products containing neonicotinoid pesticides (Ordinance introduced by Commissioner Fritz) 1 hour requested</p>	<b>PASSED TO SECOND READING APRIL 1, 2015 AT 9:30 AM</b>
<p><b>319 TIME CERTAIN: 3:00 PM</b> – Add Code Removing Barriers to Employment to establish procedures for the use of criminal history information by employers within the City (Ordinance introduced by Mayor Hales; add Code Chapter 23.10) 2 hours requested</p>	<b>CONTINUED TO: DATE TO BE ANNOUNCED</b>

**NOTE:** "Time Certain" indicates that an item will not be heard by Council **prior** to the time specified.

Communications items are three minutes each. Regular Agenda items taking longer than five minutes have the time estimate noted next to the item.

The \* indicates an emergency ordinance, which takes effect immediately if passed. Non-emergency ordinances require two readings and a 30-day waiting period before taking effect. Resolutions, reports, etc., adopted by Council are effective after adjournment.

The above summary is published by the City Auditor as provided by Section 2-113 of the Charter and Ordinance No. 130672.



**MARCH 25, 2015**

Council Chambers is equipped with a sound system for the hearing impaired. Assisted listening devices are available from the Clerk.

The City of Portland will gladly accommodate requests for an interpreter or make other accommodations that further inclusivity. Please make your request at least 48 hours before the meeting to the Council Clerk 823-4086. (TTY 503-823-6868).

City Council meetings can be viewed at <http://www.portlandoregon.gov/video>. The meetings are also cablecast on CityNet 30, Portland Community Media television.

**Mary Hull Caballero**  
Auditor of the City of Portland

=====

Testimony is taken on all Agenda items except Communications and Second Readings. To testify, sign up on a testimony sheet as you enter Council Chambers on the day of the meeting. Individuals have 3 minutes to testify, unless otherwise stated at the meeting.

Written testimony may be emailed or mailed to the Council Clerk prior to the meeting.

To schedule a Communication, email or mail your request to the Council Clerk. Include your name, address, phone number and a brief description of the subject you will be addressing. For full details, see Testimony Policies and procedures. <http://www.portlandonline.com/auditor/index.cfm?&a=63123&c=34447>

Clerk Email: [karla.moore-love@portlandoregon.gov](mailto:karla.moore-love@portlandoregon.gov)  
Council Clerk Testimony: [cctestimony@portlandoregon.gov](mailto:cctestimony@portlandoregon.gov)  
US Mail: Council Clerk, 1221 SW Fourth Ave., Room 130, Portland OR 97204

=====

Declaration Required by Lobbyists. Portland City Code 2.12.060 states: Prior to offering public testimony before City officials, at the beginning of any meetings or phone calls with City officials, or in emails and letters to City officials, a lobbyist must declare which lobbying entity he or she is authorized to represent for that communication.

=====

‘Be a part of the picture...get involved with your City...volunteer for a City of Portland Board or Commission. For more information, a brochure, or a volunteer application, stop by the Office of Neighborhood Involvement in City Hall or call 503-823-4519.’

OFFICERS OF PORTLAND CITY GOVERNMENTCHARLIE HALES, MAYOR

Commissioner of Finance and Administration

1221 SW 4th Ave, Room 340, 97204

(503) 823-4120

website: [www.portlandonline.com/mayor/](http://www.portlandonline.com/mayor/)e-mail: [mayorhales@portlandoregon.gov](mailto:mayorhales@portlandoregon.gov)Bureau Portfolio

Portland Police Bureau

Portland Development Commission

Bureau of Planning and Sustainability

Fire &amp; Police Disability and Retirement

Office of Neighborhood Involvement

Office of Equity and Human Rights

Office of Management and Finance

Office of Government Relations

City Attorney

City Budget Office

Oversight of the Willamette River Super Fund clean-up project

NICK FISH

Commissioner of Public Works

Position Number 2

1221 SW 4th Ave, Room 240, 97204

(503) 823-3589

website: [www.portlandonline.com/fish](http://www.portlandonline.com/fish)e-mail: [Nick@portlandoregon.gov](mailto:Nick@portlandoregon.gov)Bureau Portfolio

Bureau of Environmental Services

Bureau of Hydroelectric Power

Water Bureau

Liaison Responsibilities

Elders in Action

Portland Utility Review Board

Venture Portland

Portland's Centers For The Arts

Regional Arts and Culture Council

AMANDA FRITZ

Commissioner of Public Utilities

Position Number 1

1221 SW 4th Ave, Room 220, 97204

(503) 823-3008

website: [www.portlandonline.com/fritz/](http://www.portlandonline.com/fritz/)e-mail: [amanda@portlandoregon.gov](mailto:amanda@portlandoregon.gov)Bureau Portfolio

Bureau of Parks &amp; Recreation

Bureau of Development Services

Liaison Responsibilities

Royal Rosarians

Multnomah County Animal Control

Adjustment Committee

Building Board of Appeals

Design Commission

Historic Landmarks Commission

Portland Parks Board

Urban Forestry Commission

Golf Advisory Committee

	<p>Fritz Liaison Responsibilities cont'd</p> <p>Portland International Raceway Advisory Committee</p> <p>Protected Sick Time ordinance implementation</p> <p>Council Lead on the City Coordinating Committee addressing the Department of Justice Settlement</p> <p>Visitors Development Fund Board (with Saltzman)</p>
--	---

STEVE NOVICK

Commissioner of Public Safety

Position Number 4

1221 SW 4th Ave, Room 210, 97204

(503) 823-4682

website: [www.portlandoregon.gov/novick/](http://www.portlandoregon.gov/novick/)e-mail: [Steve.Novick@portlandoregon.gov](mailto:Steve.Novick@portlandoregon.gov)

Bureau Portfolio	Liaison Responsibilities
<p>Bureau of Transportation</p> <p>Bureau of Emergency Management</p> <p>Bureau of Emergency Communications</p>	<p>Joint Policy Advisory Committee on Transportation (JPACT)</p> <p>Portland Streetcar Inc.</p> <p>Regional Emergency Management Group</p> <p>BOEC Users Group</p> <p>BOEC Finance Committee</p> <p>Taxi Cab Board of Review</p> <p>Towing Board of Review</p>

DAN SALTZMAN

Commissioner of Public Affairs

Position Number 3

1221 SW 4th Ave, Room 230, 97204

(503) 823-4151

website: [www.portlandonline.com/saltzman](http://www.portlandonline.com/saltzman)e-mail: [dan@portlandoregon.gov](mailto:dan@portlandoregon.gov)

Bureau Portfolio	Liaison Responsibilities
<p>Portland Housing Bureau</p> <p>Portland Fire &amp; Rescue</p> <p>Gateway Domestic Violence Center</p> <p>Portland Children's Levy (formerly Portland Children's Investment Fund)</p>	<p>Travel Portland</p> <p>Visitors Development Fund (with Fritz)</p> <p>Home Forward</p> <p>League of Oregon Cities</p>



MARY HULL CABALLERO

Auditor of the City of Portland

1221 SW 4th Ave, Room 140, 97204

(503) 823-4078

website: [www.portlandonline.com/auditor/](http://www.portlandonline.com/auditor/)e-mail: [AuditorHullCaballero@portlandoregon.gov](mailto:AuditorHullCaballero@portlandoregon.gov)**Portfolio**

Assessments, Finance & Foreclosure  
 Audit Services  
 City Elections  
 City Recorder  
   -Archives  
   -Council Clerk / Contracts Division  
   -Records Management  
 Hearings Office  
 IPR - Independent Police Review  
 Ombudsman  
 Portland Multnomah Progress Board

**BUREAU DIRECTORS**

Bureau of Development Services	Paul Scarlett
Bureau of Emergency Communications	Lisa Turley
Bureau of Emergency Management	Carmen Merlo
Bureau of Environmental Services	James Hagerman, Interim
Bureau of Human Resources	Anna Kanwit
Bureau of Internal Business Services	Bryant Enge
Bureau of Planning & Sustainability	Susan Anderson
Bureau of Police	Lawrence O'Dea
Bureau of Revenue & Financial Services	Ken Rust
Bureau of Technology Services	Ben Berry
Bureau of Transportation	Leah Treat
City Attorney	Tracy Reeve
City Budget Office	Andrew Scott
Fire & Police Disability and Retirement	Samuel Hutchison
Office of Equity and Human Rights	Dante James
Office of Government Relations	Martha Pellegrino
Office of Mgmt & Finance - Chief Admin Officer	Fred Miller
Office of Neighborhood Involvement	Amalia Alarcón de Morris
Portland Development Commission	Patrick Quinton
Portland Fire & Rescue	Erin Janssens
Portland Housing Bureau	Traci Manning
Portland Parks & Recreation	Mike Abbaté
Revenue Director	Thomas Lannom
Water Bureau	David Shaff

Updated 01-07-2015

## IMPACT STATEMENT

**Legislation title:** Authorize the Submittal of a Boundary Change Request to the State of Oregon to add .46 acres to the Portland Enterprise Zone (Resolution)

**Contact name:** Andy Reed, Portland Development Commission

**Contact phone:** 503-823-7053

**Presenter name:** Patrick Quinton, PDC Executive Director and Jared Wiener, Sr. Business Development Officer

### **Purpose of proposed legislation and background information:**

The Portland Development Commission (PDC) is working with an international company with an existing presence in Portland, Jaguar Land Rover (JLR), which is conditionally committed to making a significant investment in a building located at 1420 NW 18th Avenue in Portland. The company has considered multiple sites on the east and west coast and internationally, but would strongly prefer to locate near their existing research and development office in Portland. The investment would create 50-80 new permanent full-time jobs averaging \$90,000 a year plus benefits. The company will invest approximately \$4 million in capital improvements and business operations if the Portland E-Zone boundary includes their expansion site.

In addition to the investment and job creation benefits listed above, and in addition to the other regulatory requirements from the E-Zone, JLR is willing to sign an additional public benefit agreement. Within this agreement, JLR is willing to provide enhanced benefits that will focus on partnering with local start-up community on inclusive entrepreneurship programs, identification of career ladder opportunities for underrepresented populations, and diversity goals around hiring and training underrepresented populations.

JLR will also offer an "Innovation Incubator" to start-up tech companies and the goal of program will be to encourage, promote and support new software-based automotive technologies that are being developed by U.S. technology start-ups. The new operation will expand their product development offerings for themselves and for technology they plan to sell to other automakers such as GM, Chrysler, Ford, etc. The new operation will also incubate up to 12 start-up firms at the location for up to six months or longer to mentor, test and deploy technology. Up to \$3 million in contracts will be provided to those firms.

This project meets many of Portland's goals to grow an innovation economy by mentoring, incubating and financing small start-up firms and providing them with an anchor firm to test and deploy their technology.

In order to provide the company with access to the E-Zone program and ensure this project moves forward, the City is requesting that Business Oregon add this property (.46 acres) to the Portland E-Zone.

### **Financial and budgetary impacts:**

JLR is planning a \$4 million investment. The existing land building and land will continue to be taxed but any new value added to the building would be abated for a period of five years. After five years, property taxes will accrue to the City and other applicable taxing jurisdictions.

**Community impacts and community involvement:**

Oregon Administrative Rules requires notifying overlapping taxing jurisdictions of any proposed boundary amendments. That notice was provided on June 3, 2015. No concern was expressed from these partners.

Additionally, the statutes require the Port of Portland to pass a resolution in consent of proposed boundary amendments. Port staff supports the proposed action and passed a resolution on June 10, 2015 in support of the project.

**Budgetary Impact Worksheet****Does this action change appropriations?**

☐ YES: Please complete the information below.

☒ NO: Skip this section

Fund	Fund Center	Commitment Item	Functional Area	Funded Program	Grant	Sponsored Program	Amount





371 34

Tom Kelly  
Chair

**DATE:** June 17, 2015

**FOR MAYOR'S OFFICE USE ONLY**

Aneshka Dickson  
Commissioner

**TO:** Mayor Charlie Hales

Reviewed by Bureau Liaison \_\_\_\_\_

Mark Edlen  
Commissioner

**FROM:** Faye Brown, Acting Executive Director/CFO

John C. Mohls  
Commissioner

**RE:** Authorize the Submittal of a Boundary Change Request to the State of Oregon to add .46 acres to the Portland Enterprise Zone (Resolution)

Charles A. Wilhoite  
Commissioner

**1. INTENDED THURSDAY FILING DATE:** June 18, 2015

Charlie Hales  
Mayor

**2. REQUESTED COUNCIL AGENDA DATE:** June 24, 2015

**3. PRIMARY CONTACT NAME & NUMBER:** Patrick Quinton, 823-3355

Patrick Quinton  
Executive Director

**4. SECONDARY CONTACT & PREPARED BY:** Andy Reed, 823-7053

**5. PLACE ON:** ☐ CONSENT ☒ REGULAR

**6. FINANCIAL IMPACT & PUBLIC INVOLVEMENT STATEMENT ATTACHED:**

☒ Yes ☐ No ☐ N/A

**7. (THREE) ORIGINAL COPIES OF CONTRACTS APPROVED AS TO FORM BY CITY ATTORNEY**

**ATTACHED:** ☐ Yes ☐ No ☒ N/A

## 8. BACKGROUND/ANALYSIS

### Introduction and History –

222 NW Fifth Avenue  
Portland, OR  
97209-3859

This action will adopt a resolution to authorize the submittal of a boundary change request to the State of Oregon to add .46 acres to the Portland Enterprise Zone.

503-823-3200 Main  
503-823-3368 Fax  
503-823-3366 TTY

The Oregon Legislature established a statutory structure to permit cities to establish areas in their cities where businesses that invest in economic expansion and the creation and retention of jobs could claim property tax abatements for a period of time. In exchange for the tax abatements, local governments could establish local policies imposing obligations on such companies to provide designated community benefits.

In 1986, City Council established Portland's first E-Zone, designating PDC to serve as the E-Zone program manager. Since then, the E-Zone program has been an important tool to spur capital investment by companies while leveraging opportunities for employment and skills training for local residents and communities.

The Portland Development Commission (PDC) is working with an international company with an existing presence in Portland, Jaguar Land Rover (JLR), which is conditionally committed to making a significant investment in a building located at 1420 NW 18th Avenue in Portland. The company has considered multiple sites on the east and west coast and internationally, but would strongly prefer to locate near their existing research and development office in Portland. The investment would create 50-80 new permanent full-time jobs averaging \$90,000 a year plus benefits. The company will invest approximately \$4 million in capital improvements and business operations if the Portland E-Zone boundary includes their expansion site.

JLR will also offer an "Innovation Incubator" to start-up tech companies and the goal of program will be to encourage, promote and support new software-based automotive technologies that are being developed by U.S. technology start-ups. The new operation will expand their product development offerings for themselves and for technology they plan to sell to other automakers such as GM, Chrysler, Ford, etc. The new operation will also incubate up to 12 start-up firms at the location for up to six months or longer to mentor, test and deploy technology. Up to \$3 million in contracts will be provided to those firms.

In addition to the investment, incubator, and job creation benefits listed above, and in addition to the other regulatory requirements from the E-Zone, JLR is willing to sign an additional public benefit agreement. Within this agreement, JLR is willing to provide enhanced benefits that will focus on partnering with local start-up community on inclusive entrepreneurship programs, identification of career ladder opportunities for underrepresented populations, and diversity goals around hiring and training underrepresented populations.

This project meets many of Portland's goals to grow an innovation economy by mentoring, incubating and financing small start-up firms and providing them with an anchor firm to test and deploy their technology.

In order to provide the company with access to the E-Zone program and ensure this project moves forward, the City is requesting that Business Oregon add this property (.46 acres) to the Portland E-Zone.

**Legal Issues – None**

**Link to Current City Policies** -- Active use of the E-Zone program advances many objectives of the 2009 City of Portland Economic Development Strategy, the 2011 Neighborhood Economic Development (NED) Strategy, the Portland Comprehensive Plan Update, and the PDC 2015-2020 Strategic Plan which place an emphasis on creating traded-sector jobs and maximizing competitiveness and creating prosperity among all Portlanders. In addition, companies must adhere to a community benefits agreement as described in the Portland E-Zone Policy.

**Controversial Issues – None**

**Citizen Participation** -- Oregon Administrative Rules requires notifying overlapping taxing jurisdictions of any proposed boundary amendments. That notice was provided on June 3, 2015. No concern was expressed from these partners. Additionally, the statutes require the Port of Portland to pass a resolution in consent of proposed boundary amendments. Port staff supports the proposed action and passed a resolution on June 10, 2015 in support of the project.

**9. FINANCIAL IMPACT**

JLR is planning a \$4 million investment. The existing land building and land will continue to be taxed but any new value added to the building would be abated for a period of five years. After five years, property taxes will accrue to the City and other applicable taxing jurisdictions.

Over five years, the annual revenue that would be forgone by various jurisdictions with Jaguar Land Rover (JLR) receiving tax abatement is estimated as follows:

5-year Tax Abatement Period, Estimated Annual Revenue Forgone					
	County	City	PPS and ESD	Portland Community College	Special Districts
5-yr total: \$264,000	\$47,520	\$73,920	\$89,760	\$7,920	\$21,120
Annually	\$9,504	\$14,784	\$17,952	\$1,584	\$4,224

- If approved, the tax abatement period will likely begin in 2016. The tax abatement will last for five years, so company participation will end in approximately 2021.
- Tax abatement only applies to new investment. Taxes on the land and existing building will continue.
- The current yearly tax on the land and existing structure is \$66,000. Once the tax abatement period ends, the property will be fully taxed at approximately \$119,000 a year (in 5 years).

#### **10. RECOMMENDATION/ACTION REQUESTED**

It is recommended the City Council adopt a resolution to authorize the submittal of a boundary change request to the State of Oregon to add .46 acres to the Portland Enterprise Zone.

Sincerely,

 (Acting, 6/17/15)  
Faye Brown  
Acting Executive Director/ Chief Financial Officer



Menu

Set Weather

Subscribe

Sign In Search

9  
comments

# Portland OKs \$382,000 tax break for Jaguar Land Rover tech incubator



Richard Rowe (left) and Matt Jones, both of Jaguar Land Rover's Northwest Portland research facility, demonstrate a wide screen diving simulator. JLR is planning on expanding the facility where it has an "innovation incubator" to invest in startups and collaborate with them on new automotive technologies. Randy L. Rasmussen/Staff

1 / 20

(http://oregonlive.mycapture.c  
backtext=Return%20to%20th

## Most Read



**Sugar Shack property in  
Northeast Portland sold to  
Cully group for \$2.3 million**

(http://www.oregonlive.com/portland/index.ssf/2015/07/sugar\_shack\_property\_in\_northe.html#incart\_most-read\_silicon-forest\_article)

With a new game store, North Portland is about to get a little bit nerdier  
(http://www.oregonlive.com/window-shop/index.ssf/2015/07/the\_portland\_game\_store.html#incart\_most-read\_silicon-forest\_article)



**All United Airlines flights  
grounded after tech issues**

(http://www.oregonlive.com/portland/index.ssf/2015/07/all\_united\_airlines\_flights\_gr.html#incart\_most-read\_silicon-forest\_article)



**Lottery money moves  
Willamette Falls Riverwalk  
plans ahead**

(http://www.oregonlive.com/clackamascounty/index.ssf/2015/07/lottery\_money\_moves\_willamette.html#incart\_most-read\_silicon-forest\_article)



**Sugar Shack property in 'very  
marginal' condition,  
appraisal finds**

(http://www.oregonlive.com/portland/index.ssf/2015/07/sugar\_shack\_property\_in\_very\_m.html#incart\_most-read\_silicon-forest\_article)

## Google Fiber in Oregon



(http://www.oregonlive.com/silicon-forest/index.ssf/2014/02/google\_fiber\_qa\_who\_needs\_a\_gi.html#incart\_special-report)

### Google Fiber Q&A

(http://www.oregonlive.com/silicon-forest/index.ssf/2014/02/google\_fiber\_qa\_who\_needs\_a\_gi.html#incart\_special-report)

Who needs a gigabit, and what might it cost?

Google Fiber's Portland deal won't serve everyone (http://www.oregonlive.com/silicon-forest/index.ssf/2014/05/google\_fibers\_portland\_deal\_wo.html#incart\_special-report)

Portland commissioners suggest subsidizing Google Fiber for low-income residents

(http://www.oregonlive.com/silicon-forest/index.ssf/2014/05/portland\_city\_council\_approves.html#incart\_special-report)

Google Fiber faces 'issues' as it seeks public rights of way (http://www.oregonlive.com/silicon-forest/index.ssf/2014/04/google\_fiber\_faces\_issues\_as\_i.html#incart\_special-report)

All the latest Google Fiber news (http://topics.oregonlive.com/tag/google-fiber/posts.html#incart\_special-report)

## Inside Silicon Forest

**About Mike Rogoway**  
(http://connect.oregonlive.com)

**Email Mike Rogoway**  
(mailto:mrogoway@oregonian.c

**Follow @rogoway**  
(https://twitter.com/rogoway)

## Active Discussions

**1** Despite hefty penalty in Oregon civil rights case, expect more action, discussion on service animals (http://www.oregonlive.com/portland/index.ssf/2014/11/despite\_hefty\_penalty\_in\_orego.html#incart\_most-commented\_silicon-forest\_article)  
(9 comments)

**2** Portland street fee redux? Not anytime

The Portland Development Commission signed off Wednesday on \$382,000 in tax breaks for Jaguar Land Rover's new automotive technology incubator. The project will also receive \$50,000 from an industry group supported by the state.

### The automaker already has a Portland research lab

**Intel surprise: President Renee James quits in shakeup. will seek CEO job elsewhere**  
(http://www.oregonlive.com/silicon-forest/index.ssf/2015/07/intel\_surpris

**GlobeSherpa, the startup behind TriMet's ticketing app, sells to RidesScout**  
(http://www.oregonlive.com/silicon-forest/index.ssf/2015/06/globesherpa

**Lattice Semiconductor brings Oregon's chip industry downtown**  
(http://www.oregonlive.com/silicon-forest/index.ssf/2015/06/lattice\_semi

**Vending machine payments by smartphone: PayRange raises \$12 million**  
(http://www.oregonlive.com/silicon-forest/index.ssf/2015/06/payrange\_el

**Wal-Mart CEO touts 'invisible' barcode on Instagram, sending Oregon company soaring**  
(http://www.oregonlive.com/silicon-forest/index.ssf/2015/06/walmart\_ceo

**All Stories**  
(http://topics.oregonlive.com/tag/http://topics.oregonlive.com/tag/rogoway-silicon-forest/index.html/posts.html) |

(http://www.oregonlive.com/silicon-forest/index.ssf/2015/04/jaguar\_land\_rovers\_new\_portlan.html). conceived jointly with Intel, which employs 35 in Northwest Portland. **It announced plans in April to add 50 engineers at a nearby "innovation incubator."** (http://www.oregonlive.com/silicon-forest/index.ssf/2015/04/jaguar\_land\_rover\_will\_add\_50.html)

Wednesday's property tax breaks apply to that \$4 million expansion at a 30,000-square-foot site, about five blocks away from JLR's main lab, at 1420 N.W. 18<sup>th</sup> Ave. The PDC, Portland's economic development agency, says the tax breaks will save JLR \$382,000 over five years.

The savings come from property tax exemptions **through the city's enterprise zone** (http://www.oregonlive.com/portland/index.ssf/2015/06/jaguar\_land\_rover\_will\_add\_50.html) and e-commerce programs, and apply to improvements JLR plans to make to its new building. Property taxes continue to apply to the land and existing building.

JLR, like other automakers, wants to incorporate new computer technologies into its

JLR, like other automakers, wants to incorporate new computer technologies into its vehicles. Prototype systems superimpose out-of-the-road information onto the windshield so help drivers manage their music without taking their eyes off the road.

Wednesday, at an automotive conference in Germany, **Intel and JLR showed off a new technology that uses 3-D cameras** (<http://blogs.intel.com/iot/2015/06/24/driving-innovation-paving-the-road-for-auto-experience-design-with-intel-iot/>) to recognize a vehicle's owner and unlock the door, or pick music based on which driver is behind the wheel.

JLR plans to have 120 small companies participate in its Portland incubator over 10 years, beginning late this year. Of the dozen startups participating each year, the PDC said JLR will pick two from members of "underrepresented" populations – part of **the agency's ongoing effort to increase diversity within the city's rapidly growing tech community** (<http://www.oregonlive.com/silicon-forest/index.ssf/2015/06/portland-tech-leaders-issue-di.html#incart-river>).

In addition to the property tax breaks, a state-funded program called Drive Oregon will grant \$50,000 for JLR's incubator. The organization, funded in part by state lottery dollars, promotes electric vehicle technology.

*Correction: This article has been corrected to note the PDC approved the tax breaks on Wednesday, not Thursday, and to clarify that Drive Oregon is not run by the state, though it receives state funds.*

-- Mike Rogoway

[mrogoway@oregonian.com](mailto:mrogoway@oregonian.com) (<mailto:mrogoway@oregonian.com>)

503-294-7699

[@rogoway](https://twitter.com/rogoway) (<https://twitter.com/rogoway>)

Tweet 53 Share 9 Share 0 Reddit

## Related Stories



**Jaguar Land Rover could see tax breaks under \$4 million Portland expansion plan**

(<http://www.oregonlive.com/portland/j>)



**Jaguar Land Rover's new Portland lab seeks to make automotive tech driver-friendly**

(<http://www.oregonlive.com/silicon-forest/index.ssf/2015/04/jaguar-land-r>)

9 comments

Sign in

Post comment as...

Newest | Oldest

**scallyman** (<http://connect.oregonlive.com/user/scallyman/index.html>) 13 days ago  
(<http://connect.oregonlive.com/user/scallyman/index.html>)  
I see small companies, particularly in the next few years. Yeah, they'll be repair shops trying to keep Land Rovers running. I grew up handing wrenches to my dad as he tweaked Land Rovers owned by delusional optimists. Best wishes to JLR. They'll need it.

Like Reply

**Vic Bs pappy** (<http://connect.oregonlive.com/user/Vicpappy/index.html>) 13 days ago  
(<http://connect.oregonlive.com/user/Vicpappy/index.html>)  
There is my confusion: if tax breaks are needed to attract new businesses and tax breaks are needed to keep existing large corporations then doesn't that imply that Oregon's tax rates are too high? Doesn't it also imply that lowering taxes would attract more new business?

Like Reply

**VoxDundee** (<http://connect.oregonlive.com/user/VoxDundee/index.html>) 13 days ago  
(<http://connect.oregonlive.com/user/VoxDundee/index.html>)  
It seems appropriate that Land Rover is featured - due to Portland's (and Oregon's) projected road conditions, that's about the only vehicle that can make the drive.  
May have influenced them to set up shop here - that can claim the vehicle as "Portland Rated."

1 (<http://connect.oregonlive.com/user/Vicpappy/index.html>) Like Reply

**DriveOregon** (<http://connect.oregonlive.com/user/driveoregon/index.html>) 13 days ago  
(<http://connect.oregonlive.com/user/driveoregon/index.html>)  
The automotive project in Oregon is booming, and this incubator project will be transformative in helping Oregon claim a piece of this growing market.

Just to clarify, though, Drive Oregon is not a state program, we are an independent nonprofit funded, in part, with state lottery dollars. Our grant is a competitively awarded matching grant, not a subsidy.

1 (<http://connect.oregonlive.com/user/richb429/index.html>) Like Reply



**Mike Rogoway | The Oregonian/OregonLive** (<http://connect.oregonlive.com/user/MikeRogoway/index.html>) 13 days ago  
(<http://connect.oregonlive.com/user/MikeRogoway/index.html>)  
**@DriveOregon** (<http://connect.oregonlive.com/user/driveoregon/index.html>)  
Thanks for clarifying.  
I've corrected the post, and noted the correction at the end of the article.  
-- Mike

Like Reply

**BadJoke** (<http://connect.oregonlive.com/user/BadJoke/index.html>) 13 days ago  
(<http://connect.oregonlive.com/user/BadJoke/index.html>)  
More welcome for the not...meanwhile...street people promoting.

Like Reply



**richb429** (<http://connect.oregonlive.com/user/richb429/index.html>) 13 days ago  
(<http://connect.oregonlive.com/user/richb429/index.html>)  
(<http://connect.oregonlive.com/user/BadJoke/index.html>) A tech incubator could be built at any of the Land Rover facilities. Having it in Portland is a


- 2 **regon** ([http://www.oregonlive.com/portland/index.ssf/2015/07/portland-street-ly-cadux-reo-similcar-not-commented\\_silicon-forest\\_article](http://www.oregonlive.com/portland/index.ssf/2015/07/portland-street-ly-cadux-reo-similcar-not-commented_silicon-forest_article)) (74 comments)
- 3 **Live updates: 4 Oregon Ducks targets set to commit Thursday at The Opening** ([http://www.oregonlive.com/recruiting/index.ssf/2015/07/live\\_updates\\_oregon\\_ducks\\_targ.html#incart\\_most-commented\\_silicon-forest\\_article](http://www.oregonlive.com/recruiting/index.ssf/2015/07/live_updates_oregon_ducks_targ.html#incart_most-commented_silicon-forest_article)) (+ comments)
- 4 **South Carolina House approves removal of Confederate flag from Capitol grounds** ([http://www.oregonlive.com/today/index.ssf/2015/07/south\\_carolina\\_house\\_approves.html#incart\\_most-commented\\_silicon-forest\\_article](http://www.oregonlive.com/today/index.ssf/2015/07/south_carolina_house_approves.html#incart_most-commented_silicon-forest_article)) (5 comments)
- 5 **Second accuser claims he was 16 when gay activist Terry Bean had sex with him in 1979** ([http://www.oregonlive.com/portland/index.ssf/2015/07/second\\_accuser\\_claims\\_he\\_was\\_1.html#incart\\_most-commented\\_silicon-forest\\_article](http://www.oregonlive.com/portland/index.ssf/2015/07/second_accuser_claims_he_was_1.html#incart_most-commented_silicon-forest_article)) (81 comments)

See more comments »  
(<http://www.oregonlive.com/interact/>)

3 <http://connect.oregonlive.com/user/napajd/index.html>   
<http://connect.oregonlive.com/user/aconcernedportlander/index.html>   
<http://connect.oregonlive.com/user/PhilHKnight/index.html> Like Reply

 **BadJoke** (<http://connect.oregonlive.com/user/BadJoke/index.html>)  
(<http://connect.oregonlive.com/user/BadJoke/index.html>) 13 days ago  
(<http://connect.oregonlive.com/user/richb429/index.html>) No  
ne. Not in your world anyways.

Like Reply

 **aconcernedportlander**  
(<http://connect.oregonlive.com/user/aconcernedportlander/index.html>) 13 days ago  
Although I usually do not favor tax reduction deals, this is a big win for Portland.

2 <http://connect.oregonlive.com/user/napajd/index.html>   
(<http://connect.oregonlive.com/user/richb429/index.html>) Like Reply

## Best of OregonLive.com

([http://www.oregonlive.com/business/story\\_tower\\_now\\_called\\_yard.html#ixof](http://www.oregonlive.com/business/story_tower_now_called_yard.html#ixof)) 21-story tower taking shape at Burnside Bridgehead...  
([http://www.oregonlive.com/business/story\\_tower\\_now\\_called\\_yard.html#ixof](http://www.oregonlive.com/business/story_tower_now_called_yard.html#ixof))  
([http://www.oregonlive.com/multimedia/Animal\\_photos\\_The\\_week\\_in\\_cute\\_of](http://www.oregonlive.com/multimedia/Animal_photos_The_week_in_cute_of))  
([http://www.oregonlive.com/multimedia/Animal\\_photos\\_The\\_week\\_in\\_cute\\_of](http://www.oregonlive.com/multimedia/Animal_photos_The_week_in_cute_of))  
([http://www.oregonlive.com/opinion/Editorial\\_Cartoons\\_of\\_the\\_Week\\_PHOTOS](http://www.oregonlive.com/opinion/Editorial_Cartoons_of_the_Week_PHOTOS))  
([http://www.oregonlive.com/opinion/Editorial\\_Cartoons\\_of\\_the\\_Week\\_PHOTOS](http://www.oregonlive.com/opinion/Editorial_Cartoons_of_the_Week_PHOTOS))



### About Us

About OregonLive.com [Jobs at Oregonian Media](http://www.oregonlive.com/about-us/)  
(<http://www.oregonlive.com/about-us/>)  
About Oregonian Media (<http://www.oregonianmedia.com/group-us/employment-priorities/>)  
Group us/employment-priorities/  
(<http://www.oregonianmedia.com/group-us/employment-priorities/>)  
Advertise with us [FAQ](http://www.oregonianmedia.com/group-us/employment-priorities/)  
(<http://www.oregonianmedia.com/group-us/employment-priorities/>)  
Our Journalists  
Contact Us (<http://www.oregonianmedia.com/group-us/employment-priorities/>)  
(<http://www.oregonianmedia.com/group-us/employment-priorities/>)

### Subscribe Today

The Oregonian (<https://orgiservices.dticloud.com/cgi-bin/subscribe/subscribe>)  
Hillsboro Argus (<http://www.oregonlive.com/argus/subscribe/>)  
Email Newsletters (<http://www.oregonlive.com/newsletters/>)  
Text Alerts (<http://www.oregonlive.com/text-alerts/>)  
RSS (<http://www.oregonlive.com/siteindex/>)

### Already a Subscriber

Manage your Subscription (<https://member.oregonlive.com/LogIn.aspx>)  
Delivery feedback (<https://member.oregonlive.com/LogIn.aspx>)  
Place a vacation hold (<https://member.oregonlive.com/LogIn.aspx>)  
Make a payment (<https://member.oregonlive.com/LogIn.aspx>)

### OregonLive.com Sections

News Obituaries  
(<http://www.oregonlive.com/news/>)  
Business/about- Jobs  
(<http://www.oregonlive.com/business/about->)  
Sports Autos  
(<http://www.oregonlive.com/sports/>)  
High School Sports (<http://www.oregonlive.com/high-school-sports/>)  
Opinion  
(<http://www.oregonlive.com/opinion/>)  
Living  
(<http://www.oregonlive.com/living/>)  
Travel  
(<http://www.oregonlive.com/travel/>)  
Opinion  
(<http://www.oregonlive.com/opinion/>)

### Your Regional News Pages

Clackamas County [Portland](http://www.oregonlive.com/clackamas-county/)  
(<http://www.oregonlive.com/clackamas-county/>)  
Clark County [Washington County](http://www.oregonlive.com/clark-county/)  
(<http://www.oregonlive.com/clark-county/>)  
More Local News  
(<http://www.oregonlive.com/local/>)

### Mobile

iPhone, Android apps  
(<http://www.oregonlive.com/mobile-device/>) | Tablet  
Apps (<http://www.oregonlive.com/mobile-device/>)

### More on OregonLive.com

Forums [Post a job](http://www.oregonlive.com/forums/)  
(<http://www.oregonlive.com/forums/>)  
Videos [Post a classified ad](http://www.oregonlive.com/videos/)  
(<http://www.oregonlive.com/videos/>)  
Photos [Sell your car](http://www.oregonlive.com/photos/)  
(<http://www.oregonlive.com/photos/>)  
Interact with us [Sell/rent your home](http://www.oregonlive.com/interact/)  
(<http://www.oregonlive.com/interact/>)  
Weather [Sitemap & search](http://www.oregonlive.com/weather/)  
(<http://www.oregonlive.com/weather/>)

### Follow Us

Twitter (<http://twitter.com/oregonian>) |  
Facebook (<http://facebook.com/theoregonian>) |  
Google+ (<http://google.com/+oregonian>) |  
Pinterest (<http://pinterest.com/theoregonian>) |  
Instagram (<http://instagram.com/theoregonian>) |  
Tumblr (<http://oregonianphoto.tumblr.com>)

(<http://www.advanceddigital.com/>)

Registration on or use of this site constitutes acceptance of our [User Agreement](http://www.oregonlive.com/useragreement/) (<http://www.oregonlive.com/useragreement/>) and [Privacy Policy](http://www.oregonlive.com/privacypolicy/) (<http://www.oregonlive.com/privacypolicy/>)

© 2015 Oregon Live LLC. All rights reserved (About Us (<http://www.oregonianmediagroup.com/>)).  
The material on this site may not be reproduced, distributed, transmitted, cached or otherwise used, except with the prior written permission of Oregon Live LLC.

Community Rules (<http://www.oregonlive.com/forums/index.ssf?rules.html>) apply to all content you upload or otherwise submit to this site.  
Contact interactivity management. (<http://www.oregonlive.com/interactivity/>)

Ad Choices ([http://www.advance.net/advancedigitalUserAgreement#opt\\_out](http://www.advance.net/advancedigitalUserAgreement#opt_out))



# Portland tech leaders issue 'diversity pledge'



By **Mike Rogoway** | [The Oregonian/OregonLive](#)

[Email the author](#) | [Follow on Twitter](#)

on June 17, 2015 at 9:03 AM, updated June 17, 2015 at 9:59 PM

Thirteen of Portland's most visible tech leaders **committed themselves Wednesday** to promote diversity in their companies, joining a broad effort across the industry to make high-paying technology jobs more inclusive.

Intel, Google and many other big tech companies have pledged to make their workforces more representative of the communities where they operate.

Intel, **Oregon's largest private employer**, has been at the forefront of the effort with a **January pledge to spend \$300 million** to boost diversity. The company says it wants its workforce to be more diverse at all levels of the organization. It's investing in science and technical educational program in minority communities and has set a target of "full representation (of women and minorities) at all levels in our company workforce by 2020."

Oregon tech workers, like tech employees elsewhere, are overwhelmingly white and male. Nearly three-quarters of Intel jobs are held by men and the percentage is roughly the same across Oregon's fast-growing software industry.

The 13 tech leaders signing Wednesday's "diversity pledge" reflect the disparity. Only one, Zapproved chief executive Monica Enand, is female. That's indicative of the profound disparity at the top ranks of Oregon tech companies - among large tech companies headquartered in the state, just 11 percent of their top executives are women.

The Portland Development Commission, Technology Association of Oregon and the state's Worksystems employment office also signed Wednesday's pledge.

Unlike Intel's initiative, Wednesday's Portland pledge -- signed by leaders of small companies with a tiny fraction of Intel's resources -- contains no specific steps to improve diversity.

Instead, **the tech leaders say in general terms** they will work with organizations that serve underrepresented communities, develop strategies to improve diversity in hiring, educate their current work forces on unconscious bias and communicate information about diversity within the industry.



[Electric Lightwave sale closes Wednesday: New owner wants immediate, 'face-to-face meetings' with each employee](#)

[Confusion and doubt as Trump considers new rules for skilled foreign workers](#)

[Portland startup Opal raises \\$15.5 million, plans to double workforce](#)

[Verizon buys Portland drone startup Skyward](#)

[Vadio, once among Portland's most prominent startups, is winding down](#)

[All Stories](#)

## Diversity in Portland tech

**Portland population, overall:** 51 percent female

**Tech industry, Portland:** 33 percent female

**Portland population, overall:** 75 percent white

**Tech industry, Portland:** 84 percent white

Source: *Techtown Portland*

ADVERTISING

In their pledge, the companies acknowledge greater effort is needed.

"The roots of gender and race underrepresentation in technology go deep into our education system and society," said Sam Blackman, chief executive of Portland video-processing company Elemental Technologies, among the biggest of the city's young tech companies.

"The work we are taking on as rising tech companies to bring these issues to the surface is important," Blackman wrote in a letter accompanying the pledge. "But it is just the beginning."

-- Mike Rogoway

[mrogoway@oregonian.com](mailto:mrogoway@oregonian.com)

503-294-7699


[@rogoway](#)

Registration on or use of this site constitutes acceptance of our **User Agreement** and **Privacy Policy**

© 2017 Oregon Live LLC. All rights reserved (**About Us**).

The material on this site may not be reproduced, distributed, transmitted, cached or otherwise used, except with the prior written permission of Oregon Live LLC.

**Community Rules** apply to all content you upload or otherwise submit to this site.

 **Ad Choices**

# PRESIDENT OBAMA INCLUDES CODE OREGON IN TECHHIRE INITIATIVE

MARCH 9TH, 2015

President Obama announced today the launch of TechHire, a bold public-private initiative with over 300 employer partners aimed at helping more Americans train and connect to IT jobs in fields such as software development, network administration and cybersecurity. Worksystems' **Code Oregon** is one of 20 successful technology training programs that was highlighted by the President as he challenges more communities to follow our lead.

## *Code Oregon featured on KGW News!*

**Code Oregon** is an innovative, free, online training program dedicated to teaching 10,000 Oregonians how to code and prepare them for high paying, in-demand careers in software development, front and back-end web development, and app design. Since Code Oregon's "soft launch," 5,256 people in the Portland area have signed up to participate in training with just over 2,200 having earned at least one badge.

Training graduates are connected to local technology jobs through WorkSource, the public workforce system and member of America's Job Center Network. We are actively working with employer partners including Square Space, Metal Toad, and Portland General Electric to fill the 2,400 technology job openings that are available in the Portland Metro region today.

As part of the TechHire initiative, Worksystems is committing to offer 100 on-the-job training opportunities and 50 paid internships to provide work experience and promote hiring of Code Oregon graduates. In addition, we are partnering with JP Morgan Chase to recruit tech mentors to offer additional support to underserved communities, cross-walking community college and university curriculum with on-line badges, and providing transferrable college credit to 60 students who complete the accelerated Code Oregon pathway model.

### **Background on Code Oregon**

By 2020, there will be one million more computer programming jobs in the U.S. than workers to fill them, and 10,000 of those jobs will be in the Portland metro region. To close the skills gap and prepare area residents for careers in technology, Worksystems, the local Workforce Development Board, has teamed up with online training provider Treehouse to build the region's future IT workforce through Code Oregon.

Online courses are offered for free through funding from Worksystems and the State of Oregon with a focus on connecting underserved/underrepresented populations such as communities of color, women, older workers and Veterans to training. Our goal is to build a diverse, inclusive technology talent pipeline that supports Oregon's growing software sector and establishes Oregon as a leader in software talent.

**PORTLAND DEVELOPMENT COMMISSION**

Portland, Oregon

**RESOLUTION NO. 7194**

**ADOPTING AN UPDATED FINANCIAL INVESTMENT POLICY AND  
PROCESS FOR INTERNAL REVIEW AND APPROVAL OF FINANCIAL  
INVESTMENTS**

**WHEREAS**, the Portland Development Commission (“PDC”) Board of Commissioners (“Board”) by separate actions, approves guidelines for the administration of a variety of financial assistance programs consistent with the 2015-2020 PDC Strategic Plan (“Strategic Plan”);

**WHEREAS**, in making financial investments, it is prudent business practice to thoroughly review proposed projects to minimize risk, maximize public benefits, and allow for the repayment of invested public funds and a financial return on that investment; and as such, the PDC Board desires to update the formal internal review process to assist the PDC Board and Executive Director in making financial investment decisions;

**WHEREAS**, on March 13, 2013, through Resolution No. 6993, the PDC Board adopted an Updated Financial Investment Policy and Process for Internal Review and Approval of Financial Investments;

**WHEREAS**, the financial resources used to accomplish PDC’s projects and programs have traditionally come from tax increment financing (“TIF”);

**WHEREAS**, PDC’s legacy urban renewal areas (URAs) are scheduled to sunset within the next ten years, severely limiting PDC’s ability to access new TIF;

**WHEREAS**, TIF, as governed by Oregon Revised Statutes Chapter 457, limits the use of TIF geographically and only for investment in and support of physical improvements to real estate;

**WHEREAS**, the Strategic Plan requires funding for activities other than those that are TIF eligible; and

**WHEREAS**, the PDC Board wishes to use remaining assets within current URAs and other financial tools to transition PDC to funding sources with eligible uses that are consistent with the Strategic Plan while continuing to achieve the goals of each URA plan.

**NOW, THEREFORE, BE IT RESOLVED**, that the PDC Board adopts the following financial investment principles:

1. When investing public resources to achieve its Strategic Plan, PDC will apply sound financial guidelines and accountable and transparent processes.
2. In general, all investments should seek public benefits and result in asset ownership or a financial return of and on capital.
3. Investment should have a leverage target that maximizes the percentage of non-PDC resources in a project.
4. Grants and infrastructure expenditures should be limited to annual PDC-wide budgets that are consistent with PDC's long-term plan for financial sustainability.
5. Any forgiveness of loan principal will be considered a grant and count against the current or following fiscal year budget established for grants.

**BE IT FURTHER RESOLVED**, that the PDC Board directs the Executive Director to establish an internal Financial Investment Committee ("FIC") with a minimum of three members to be appointed by the Executive Director in consultation with the PDC Board Chair;

**BE IT FURTHER RESOLVED**, that FIC shall have the following responsibilities to review for recommendation:

1. Loans and grants for any financial assistance programs where approval has not been delegated by the Executive Director;
2. Loan modifications where approval has not been delegated by the Executive Director;
3. New and revised financial assistance guidelines;
4. PDC debt financings;
5. Acquisition, disposition, and long-term (greater than two years) leasing of real property;
6. Acquisition of real property collateral (by foreclosure, deed in lieu of foreclosure, or voluntary transfer); for purpose of future sale to apply against outstanding obligations; and
7. Additional responsibilities delegated by the PDC Board and/or the Executive Director.

**BE IT FURTHER RESOLVED**, that the Executive Director may approve any loan exception to adopted loan guidelines except (1) for the maximum loan amount, and (2) any reduction in the repayment obligation of the borrower of more than \$500,000;

**BE IT FURTHER RESOLVED**, that prior to FIC recommending approval of financial assistance that includes exceptions to adopted guidelines, FIC will verify through appropriate due diligence that program objectives are not jeopardized and any exception is necessary to meet agency objectives and goals;

**BE IT FURTHER RESOLVED**, that on a quarterly basis the Chief Financial Officer shall provide to the PDC Board a comprehensive report of all financial assistance requests approved by the Executive Director or other delegates during the quarter, including an explanation of all requests approved with exceptions to program guidelines;

**BE IT FURTHER RESOLVED**, that the PDC Board hereby delegates authority to the Executive Director to approve and update the FIC Charter and FIC Procedures as needed to implement the Financial Investment Policy and Process for Internal Review and Approval of Financial Investments;

**BE IT FURTHER RESOLVED**, that Resolution No. 6993 is hereby replaced in its entirety; and;

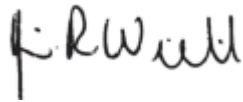


Board Resolution – Amending the Financial Investment Policy  
June 8, 2016

Page 3 of 3

**BE IT FURTHER RESOLVED**, that this resolution shall become effective immediately upon its adoption.

Adopted by the Portland Development Commission on June 8, 2016

A handwritten signature in black ink, appearing to read "G. Wiedrick".

---

Gina Wiedrick, Recording Secretary

**RESOLUTION NO. 7187****RESOLUTION TITLE:**

ADOPTING THE ANNUAL BUDGET OF THE PORTLAND DEVELOPMENT COMMISSION FOR THE FISCAL YEAR BEGINNING JULY 1, 2016, AND ENDING JUNE 30, 2017; AND MAKING APPROPRIATIONS

Adopted by the Portland Development Commission on June 8, 2016

PRESENT FOR VOTE	COMMISSIONERS	VOTE		
		Yea	Nay	Abstain
<input checked="" type="checkbox"/>	Chair Tom Kelly	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Commissioner Gustavo Cruz, Jr.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Commissioner Aneshka Dickson	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Commissioner Mark Edlen	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Commissioner William Myers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Consent Agenda <input checked="" type="checkbox"/> Regular Agenda				

**CERTIFICATION**

The undersigned hereby certifies that:

*The attached resolution is a true and correct copy of the resolution as finally adopted at a Board Meeting of the Portland Development Commission and as duly recorded in the official minutes of the meeting.*

	<b>Date:</b>
	June 9, 2016
Gina Wiedrick, Recording Secretary	



benjamin barber <starworks5@gmail.com>

---

## FW: Invitation to join a voluntary discussion

2 messages

---

**Barber, Benjamin** <benjamin.barber@intel.com>  
To: "starworks5@gmail.com" <starworks5@gmail.com>

Wed, Jul 27, 2016 at 7:04 PM

---

**From:** Barber, Benjamin  
**Sent:** Wednesday, July 27, 2016 7:03 PM  
**To:** Taylor, Richard HR <[richard.hr.taylor@intel.com](mailto:richard.hr.taylor@intel.com)>  
**Subject:** RE: Invitation to join a voluntary discussion

I understand as much as you do the idea that the king makes the rules, and that Brad Avakian has been enforcing the rules politically rather than equally, as I imagine is also the case with HR at intel being that legal greenlit it. If you really want my opinion it will be full of inconvenient truths, and as I've witnessed before in the local tech scene is that having unpopular but factual opinions, are reacted to with less than reasonable, logical and appropriate responses. I'd personally rather as a company we focus on work objectives, and the perhaps tangential positive end results of those work objectives, than focus on whatever personal characteristics of the workforce.

---

**From:** Barber, Benjamin  
**Sent:** Wednesday, July 27, 2016 6:50 PM  
**To:** Taylor, Richard HR <[richard.hr.taylor@intel.com](mailto:richard.hr.taylor@intel.com)>  
**Subject:** RE: Invitation to join a voluntary discussion

I'm of the opinion that discrimination for any reason whatsoever is wrong, and that politics even including identity politics do not belong in the workplace, therefore words like "minority" or "majority" are superfluous, and anyone who targets anyone on the basis of a suspect class for whatever reason is inherently wrong on the subject.

Would you like me to participate as a white child of literally illiterate parents, who had us all self identify as hispanic and jews explicitly for affirmative action benefits, and did humanitarian work with muslims in malaysia, afterwards being shot in the eye and married an albino teaching special education while teaching at risk youth?

Or would you like me to participate as someone who not only knows a lot about discrimination, also knows quite a lot about the national and state laws that also apply, in addition to the actual scientific studies about the topic, and would probably end up causing a giant issue due to the contradictions inherent in corporate policy?

---

**From:** Taylor, Richard HR  
**Sent:** Wednesday, July 27, 2016 2:37 PM  
**To:** Barber, Benjamin <[benjamin.barber@intel.com](mailto:benjamin.barber@intel.com)>  
**Subject:** Invitation to join a voluntary discussion

Hello Benjamin

Thank you for engaging in the conversation on the Circuit article, "The road to full representation: a study on retention and progression". I want to better understand your views and perspectives and listen to hear what we can do to make Diversity a program that is inclusive of all people in Intel.

I would like to invite you to participate in a small group discussion with me and others of similar views to yourself. This discussion is a voluntary, open, and candid discussion with no repercussion or hidden agendas. If you are interested in participating, please respond back to this email to get a calendar invite.

Your feedback is critical to our diversity and inclusion progress because if we ignore the views of the majority we will make no progress. I look forward to having a meaningful conversation.

Richard

---

**Barber, Benjamin** <[benjamin.barber@intel.com](mailto:benjamin.barber@intel.com)>  
To: "Taylor, Richard HR" <[richard.hr.taylor@intel.com](mailto:richard.hr.taylor@intel.com)>

Wed, Jul 27, 2016 at 11:54 PM

This will be the last email that I will send to you or anyone else on this topic after which I would like to be left alone, I prefer to focus on work and not on arguing with people who will not take my suggestions after they solicit them from me, and are keen on doing the exact opposite of them even when informed that they're factually wrong. I'm perfectly fine and supportive with the sort of movement to remove unlawful bias from the organization, If you want to redact names and personally identifying information from the employee hiring process, or use qualitative measurements to make judgements about that hiring process, or create scaffolded learning / apprenticeship programs for unskilled or under-skilled workers. You're taking a giant risk with this policy regarding legal compliance, especially if the age discrimination claims mentioned by BK in the Oregonian bear fruit, I could actually cite you all the laws and the case law if you really wanted me to, I may very well know them better than you do at this point.

"Textbook definition of racism "a person who believes that a particular race is superior to another." Please tell me how a transistor or a line of code cares produced cares about the race or gender of the person who produced it. If you really want to stop racism or sexism, then strip away the names from the resume's, and conduct online technical interviews. -- [Barber, Benjamin](#)

"That would be a good start...we would have to use that process for internal and external hiring. Unfortunately, it would only get us so far. We still have an environment where diverse employees are getting the development opportunities that prepares them to do well in those interviews at a lower rate than would be expected and that is not something that can be addressed using this strategy." -- [Henkel, Laurel](#)

"You're not talking about equality of opportunities, you're talking about equality of outcomes and conflating the two, by using the words "at a lower rate". It's likely that I'm more well versed in this topic than you're aware of, but that no amount of facts are going to change your opinion that is based on emotion.

google "suspect class" -- [Barber, Benjamin](#)

You probably also know already that the race riots in Malaysia were caused by the affirmative action policies enacted, and which has also enabled the cronyism and corruption that is now the "One Malaysia Development Berhad" scandal, which a prime example why a focus on any sort of identity politics not healthy for any group whatsoever.

[https://en.wikipedia.org/wiki/Malaysian\\_New\\_Economic\\_Policy#Racial\\_Riot\\_of\\_1969](https://en.wikipedia.org/wiki/Malaysian_New_Economic_Policy#Racial_Riot_of_1969)

[https://en.wikipedia.org/wiki/1Malaysia\\_Development\\_Berhad#History](https://en.wikipedia.org/wiki/1Malaysia_Development_Berhad#History)

---

**From:** Taylor, Richard HR  
**Sent:** Wednesday, July 27, 2016 10:22 PM  
**To:** Barber, Benjamin <[benjamin.barber@intel.com](mailto:benjamin.barber@intel.com)>  
**Subject:** Re: Invitation to join a voluntary discussion

If your intention is to disrupt and argue rather than give me your suggestions on what we can do to make intel more inclusive and better for everyone I would rather you didn't come. The intent is not for me to preach and convert attendees to my viewpoint, it is to listen to suggestions for what we can do to make improvements.

If you choose to come and disrupt that's your prerogative and I won't stop you. If it gets too bad and is killing conversation I will have to ask you to leave. However I won't argue the merits of the DI with you

By the way my mother comes from Malaysia. She lived through the Japanese occupation and the race riots. Married my father and then suffered a lot of prejudice on coming to the UK some of which I witnessed as a child. So I prefer not to have lectures on discrimination from any parties.

Richard

On Jul 27, 2016, at 6:50 PM, Barber, Benjamin <[benjamin.barber@intel.com](mailto:benjamin.barber@intel.com)> wrote:

I'm of the opinion that discrimination for any reason whatsoever is wrong, and that politics even including identity politics do not belong in the workplace, therefore words like "minority" or "majority" are superfluous, and anyone who targets anyone on the basis of a suspect class for whatever reason is inherently wrong on the subject.

Would you like me to participate as a white child of literally illiterate parents, who had us all self identify as hispanic and jews explicitly for affirmative action benefits, and did humanitarian work with muslims in malaysia, afterwards being shot in the eye and married an albino teaching special education while teaching at risk youth?

Or would you like me to participate as someone who not only knows a lot about discrimination, also knows quite a lot about the national and state laws that also apply, in addition to the actual scientific studies about the topic, and would probably end up causing a giant issue due to the contradictions inherent in corporate policy?

---

**From:** Taylor, Richard HR  
**Sent:** Wednesday, July 27, 2016 2:37 PM  
**To:** Barber, Benjamin <[benjamin.barber@intel.com](mailto:benjamin.barber@intel.com)>  
**Subject:** Invitation to join a voluntary discussion

Hello Benjamin

Thank you for engaging in the conversation on the Circuit article, "The road to full representation: a study on retention and progression". I want to better understand your views and perspectives and listen to hear what we can do to make Diversity a program that is inclusive of all people in Intel.

I would like to invite you to participate in a small group discussion with me and others of similar views to yourself. This discussion is a voluntary, open, and candid discussion with no repercussion or hidden agendas. If you are interested in participating, please respond back to this email to get a calendar invite.

Your feedback is critical to our diversity and inclusion progress because if we ignore the views of the majority we will make no progress. I look forward to having a meaningful conversation.



Richard



benjamin barber <starworks5@gmail.com>

---

## software testing / QA

27 messages

---

**benjamin barber** <starworks5@gmail.com>  
To: des.sensoryinc@gmail.com

Tue, Jan 20, 2015 at 1:24 PM

I saw your article on the \$15 dollar gift card, but I am also interested in working for your company, because i have a love of computer research (I'm doing computer vision systems).

---

**Des Guensch** <des.sensoryinc@gmail.com>  
To: benjamin barber <starworks5@gmail.com>

Tue, Jan 20, 2015 at 1:32 PM

Hello Benjamin,

Thank you for your interest.

The recording takes about 15-20 minutes. I am around all this week and doing recordings between 9:30am-4pm.

Our office is located at 735 SW 20th Place, Suite 120. We are a block up from Providence Park, behind US Bank and below the VOLVO sign on W. Burnside.

IF you are interested in working for Sensory Inc, check out the website <http://www.sensory.com/company/employment/> that way you can see the most recent job posts and at which location.

Take care and let me know a date/time that works best for you!

Thanks,

Des  
Sensory Inc  
Portland OR  
[Quoted text hidden]

---

**benjamin barber** <starworks5@gmail.com>  
To: Des Guensch <des.sensoryinc@gmail.com>

Wed, Jan 21, 2015 at 3:23 PM

I stopped by and both tried to call and use the buzzer but both failed

[Quoted text hidden]

---

**Des Guensch** <des.sensoryinc@gmail.com>  
To: benjamin barber <starworks5@gmail.com>

Wed, Jan 21, 2015 at 4:20 PM

pleasure to meet you this afternoon! Looking forward to hearing about your future creations!!!

Take care Benjamin!

Des  
[Quoted text hidden]

---

**benjamin barber** <starworks5@gmail.com>

Fri, Jan 23, 2015 at 11:29 AM

To: Des Guensch <des.sensoryinc@gmail.com>, careers@sensoryinc.com, TrulySecure@sensory.com

Thanks Des,

I am curious whether or not I could be allowed to play with the TrulySecure SDK / API because I am in the Intel RealSense Challenge <https://realsenseappchallenge.intel.com/landing/> which is a contest to see who can create the best apps for Intel's new 3D sensors. These sensors are going to be appearing in the new cherry trail based mobile devices, and have an IC that automatically extracts the geometric data for facial recognition, and would probably make some of your facial recognition go more smoothly. I am currently working on the Simultaneous localisation and mapping algorithms with an FPGA and several cameras on what is essentially a 3D scanner. <https://www.youtube.com/watch?v=3oOFgOZdTUE> Though I always love the challenging problems, I don't think that I'm going to get where I need to be, when all I have is a team of (1). So I was hoping that I could do some very cool and free work on your SDK, and maybe be able to win some of that sweet Intel prize money in the process.

[Quoted text hidden]

---

**Des Guensch** <des.sensoryinc@gmail.com>

Fri, Jan 23, 2015 at 1:24 PM

To: benjamin barber <starworks5@gmail.com>

Hello Benjamin!

WOW you are a busy guy.

Items would have to be purchased or you would have to be an employee. Unfortunately the company does not allow for "free" play.

That said, our Boulder office would be the best point of contact to discuss what you are looking for...you may want to see if they have a position or have an intern position that you could apply for. Asking for an informal interview might be a great start.

I am not a tech savvy person. I am learning, slowly. The how's and why's I do not even claim to understand even when they are explained to me 1000 times.

I do the outreach, customer service, office managing and recruit for basic recordings as requested.

Wishing you the best, if I hear of any change in policy I will let you know.

Des

[Quoted text hidden]

---

**benjamin barber** <starworks5@gmail.com>

Sat, Jan 24, 2015 at 8:59 AM

To: Des Guensch <des.sensoryinc@gmail.com>

Am I to assume that the API costs alot of money, alot of different company SDK/APIs give away some smaller number of requests for free, so that developers can try/test the product before they commit to buying it, so that they know its going to work for the intended purpose. Im understand that boulder may have internships, but again im not really looking to move, I have more than enough work already, I want to stay in academia until I'm nice and wrinkly, and work on cutting edge technology.

[Quoted text hidden]

---

**Des Guensch** <des.sensoryinc@gmail.com>

Mon, Jan 26, 2015 at 9:31 AM

To: benjamin barber <starworks5@gmail.com>

Good Morning,

I don't know all the details. That would be our sales department in charge of sampling out software. I can keep you posted if anything pops up around here.

Des

[Quoted text hidden]

---

**benjamin barber** <starworks5@gmail.com>  
To: Des Guensch <des.sensoryinc@gmail.com>

Mon, Jan 26, 2015 at 10:17 AM

kay, thanks.

[Quoted text hidden]

---

**Gordon Haupt** <ghaupt@sensoryinc.com>  
Reply-To: ghaupt@sensory.com  
To: benjamin barber <starworks5@gmail.com>  
Cc: Des Guensch <des.sensoryinc@gmail.com>, careers@sensoryinc.com, TrulySecure@sensory.com

Mon, Jan 26, 2015 at 11:17 AM

Hi Benjamin,

This sounds like a great project, and I'd be happy to set you up with our SDK. I'd like to chat first to better understand what you're working on. I'm pretty much open tomorrow from 9a-2p Pacific time (except 11-11:30a) - please let me know what time works for you (and a number to call you at), or we can schedule for later in the week.

Regards,  
Gordy

***Gordon T. Haupt, Ph.D.***

***Senior Director, Vision Technologies***

***Sensory, Inc.***

Mobile: [650.703.2624](tel:650.703.2624)

Email: [ghaupt@sensory.com](mailto:ghaupt@sensory.com)

Web: [www.sensory.com](http://www.sensory.com)

[Quoted text hidden]

---

**benjamin barber** <starworks5@gmail.com>  
To: ghaupt@sensory.com

Mon, Jan 26, 2015 at 11:58 AM

Tomorrow at noon would be a great time. (pacific standard time) [9712797199](tel:9712797199) work [9712700855](tel:9712700855) home

[Quoted text hidden]

---

**Gordon Haupt** <ghaupt@sensoryinc.com>  
Reply-To: ghaupt@sensory.com  
To: benjamin barber <starworks5@gmail.com>

Mon, Jan 26, 2015 at 6:21 PM

Hi Benjamin,

That sounds great - look forward to talking to you at noon PST tomorrow.

Gordy

[Quoted text hidden]

---

**Gordon Haupt** <ghaupt@sensoryinc.com>  
Reply-To: ghaupt@sensory.com  
To: benjamin barber <starworks5@gmail.com>  
Cc: Monika Naidoo <mnaidoo@sensoryinc.com>

Tue, Jan 27, 2015 at 1:42 PM

Hi Benjamin,

Pleasure talking with you today. I'm cc'ing our Office Administrator Monika Naidoo - Monika, could you please send a mutual NDA out for Benjamin and me? Thanks!

I've also attached the Developers Agreement for the TrulySecure SDK. It has a lot of legalese, as you might expect, but if you have any questions or concerns, let me know. Otherwise, once we have both signed, I will get the SDK sent out to you.

Thanks,  
Gordy

[Quoted text hidden]

---

 **MMA\_Developers\_Agreement.pdf**  
283K

---

**Monika Naidoo** <mnaidoo@sensoryinc.com>  
To: ghaupt@sensory.com, benjamin barber <starworks5@gmail.com>

Tue, Jan 27, 2015 at 1:53 PM

Hi Gordy and Benjamin,

The NDA went out to both of you. Let me know if I can help with anything else.

Thank you and best regards,

*Monika Naidoo*

**Office Administrator**

**Sensory Inc.**

**4701 Patrick Henry Dr. Bldg. 7**  
**Santa Clara, CA 95054**



**From:** Gordon Haupt [mailto:[ghaupt@sensoryinc.com](mailto:ghaupt@sensoryinc.com)]  
**Sent:** Tuesday, January 27, 2015 1:42 PM  
**To:** benjamin barber  
**Cc:** Monika Naidoo  
**Subject:** Re: software testing / QA

[Quoted text hidden]

---

**benjamin barber** <starworks5@gmail.com>  
To: Monika Naidoo <mnaidoo@sensoryinc.com>

Tue, Jan 27, 2015 at 2:45 PM

[Quoted text hidden]

---

 **MMA\_Developers\_Agreement2.pdf**  
352K

---

**benjamin barber** <starworks5@gmail.com>  
To: Monika Naidoo <mnaidoo@sensoryinc.com>

Tue, Jan 27, 2015 at 2:50 PM

[Quoted text hidden]

---

 **MMA\_Developers\_Agreement3.pdf**  
378K

---

**benjamin barber** <starworks5@gmail.com>  
To: Monika Naidoo <mnaidoo@sensoryinc.com>  
Cc: Gordon Haupt <ghaupt@sensory.com>

Thu, Jan 29, 2015 at 2:11 PM

Hey, I think I might have sent the developers agreement only to Monika, because I forgot to use the Reply All feature. I dont know if you've had a chance to review all of the documents or the licensing policy I should abide by. Please let me know what the next step I should be taking is.

On Tue, Jan 27, 2015 at 1:53 PM, Monika Naidoo <mnaidoo@sensoryinc.com> wrote:

[Quoted text hidden]





---

**Gordon Haupt** <ghaupt@sensoryinc.com>  
Reply-To: ghaupt@sensory.com  
To: benjamin barber <starworks5@gmail.com>

Wed, Feb 4, 2015 at 6:39 AM

Hi Benjamin,

Sorry for the delay getting back to you. I'm checking with one more person and will get back to you soon, hopefully later today.

Gordy

[Quoted text hidden]

---

**benjamin barber** <starworks5@gmail.com>  
To: Gordon Haupt <ghaupt@sensory.com>

Wed, Feb 4, 2015 at 2:11 PM

Understood, thanks for the assistance, and taking the time.

[Quoted text hidden]

---

**benjamin barber** <starworks5@gmail.com>  
To: Gordon Haupt <ghaupt@sensory.com>

Thu, Feb 5, 2015 at 9:35 AM

Hi Gordon,

I am sorry for distracting you, but I was hoping you could help me , and let me know what I need to do / expect, preferably before the end of the week so that I can plan.

[Quoted text hidden]

---

**Gordon Haupt** <ghaupt@sensoryinc.com>  
Reply-To: ghaupt@sensory.com  
To: benjamin barber <starworks5@gmail.com>

Thu, Feb 5, 2015 at 9:55 AM

Hi Benjamin,

Please give me a call on my cell [650.703.2624](tel:650.703.2624) when you get a chance - I want to just talk through briefly where we're at, and then hopefully we can get you set up very soon,

Gordy

[Quoted text hidden]

---

**Gordon Haupt** <ghaupt@sensoryinc.com>  
Reply-To: ghaupt@sensory.com  
To: benjamin barber <starworks5@gmail.com>

Thu, Feb 5, 2015 at 12:06 PM

Hi Benjamin,

As we just discussed on the phone, here are the extra conditions for use of the SDK. Please respond to indicate if you accept these conditions in addition to those laid out in the mutual NDA and Developer Agreement:

In lieu of payment for SDK, Licensee agrees to the following:

- Sensory shall be provided with access to all source code created with SDK (Source)
- Sensory shall have unrestricted, non exclusive, royalty free right to use Source in any manner desired, and with no obligations to Licensee

Gordy

[Quoted text hidden]

---

**benjamin barber** <starworks5@gmail.com>  
To: Gordon Haupt <ghaupt@sensory.com>

Thu, Feb 5, 2015 at 12:11 PM

I agree to these obligations.

I hope but not demand that if the code is used that I could be attributed somewhere in the bottom of some text file or credits.

[Quoted text hidden]

---

**Gordon Haupt** <ghaupt@sensoryinc.com>  
Reply-To: ghaupt@sensory.com  
To: benjamin barber <starworks5@gmail.com>  
Cc: Jay Rawlings <jrawlings@sensoryinc.com>

Thu, Feb 5, 2015 at 12:24 PM

Thanks Benjamin.

I understand your request for attribution and, at Sensory's ultimate discretion of course, will try to make sure that happens.

I'm cc'ing Jay Rawlings from the Vision team. Any questions you may have can be directed to him and me. He will follow up with a link to download the SDK.

Look forward to seeing the project as it develops!

Gordy

[Quoted text hidden]

---

**Jay Rawlings** <jrawlings@sensoryinc.com>  
To: Gordon Haupt <ghaupt@sensory.com>  
Cc: benjamin barber <starworks5@gmail.com>

Thu, Feb 5, 2015 at 1:03 PM

Hi Benjamin,

Here is the link to the SDK. As Gordy mentioned, feel free to reach out to me if you run into any problems or questions.

<http://goo.gl/5Nvq3y>

Thanks,

**Jay Rawlings**  
QA Automation Engineer | Sensory Inc.  
2060 Broadway | Boulder, CO 80302  
[jrawlings@sensory.com](mailto:jrawlings@sensory.com) | <http://sensoryinc.com>



[Quoted text hidden]

---

**Gordon Haupt** <ghaupt@sensoryinc.com>  
Reply-To: ghaupt@sensory.com  
To: Jay Rawlings <jrawlings@sensoryinc.com>  
Cc: benjamin barber <starworks5@gmail.com>

Fri, Mar 27, 2015 at 8:24 AM

Hi Benjamin,

Checking in to see how things are going. Have you been able to incorporate the Sensory SDK into your project? Let us know if you need any help.

Gordy

[Quoted text hidden]

---

**benjamin barber** <starworks5@gmail.com>  
To: Gordon Haupt <ghaupt@sensory.com>

Thu, Apr 2, 2015 at 11:41 AM

I have just removed a couple projects off my plate, I was asked by Jan to participate in a demo session, I also have been working on network infrastructure, using solar powered computers to make my own cloud. which i use TOR and Bittorrent Maelstrom to relay traffic with.

[Quoted text hidden]

[Resource Library](#) | [Contact Us](#) | [Site Map](#) | [Search the site:](#)

 Help me find: 
for  
residentsfor  
businessesfor  
developers &  
contractors

for partners

our work

news &  
eventsabout  
the PDC

## For Businesses

[Home](#) > [Startup PDX Challenge](#)
[print this page](#)
[share this page](#)

# Startup PDX Challenge 2014: Inclusive Innovation



## PDC names winners of 2014 Startup PDX Challenge!

Six startup businesses have made the cut to win the second annual Startup PDX Challenge. This year's Challenge focused on finding entrepreneurs with diverse founding teams and the ambition to scale to a national or

international market. Each company will receive a package valued at \$50,000, with a \$15,000 working capital grant, a full year of rent-free office space at 115 SW Ash in Portland's Old Town/Chinatown, and free professional advice, memberships and services.

### The six winners, all from the Portland metropolitan area, are:

- [Yellow Scope](#), a creator of rigorous science kits just for girls;
- [RAFT Syrups](#), which brews organic botanical and cane sugar syrup for cocktails and home soda making;
- [Society Nine](#), a fight gear and activewear apparel brand for women;
- [Noappfee.com](#), a technology solution to rental market problems for landlords and tenants;
- [Design + Culture Lab](#), a research-based urban social lab addressing issues of cultural, racial and ethnic inequality; and
- [Tique Box](#), a subscription service for specialty items from local artisans.

**Merit finalists are:** [Genki Su](#); [GRASP](#); [VDO Interpreters](#); and [Carehubs](#), from the Portland area; and [ICOM](#) of Atlanta, GA, which was also the winner of the public vote.

The Challenge winners will move into the Old Town/Chinatown space in early October; a meet and greet event on Thursday, September 25 will welcome them to the neighborhood.

## Announcements

9/4/14: [PDC names winners of 2014 Startup PDX Challenge](#)

8/4/14: [Startup PDX Challenge Semifinalists named; public vote begins](#)

6/24/14: [Startup PDX Challenge draws 134 applicants from 7 states & Canada!](#)

## Contact us

For further clarification or other inquiries, please email [Katherine Krajnak](#).

[Sign up for our email list](#) (under Business Services > Startup PDX Challenge) for updates on the Startup PDX Challenge.

Follow us on Twitter at [@StartupCityPDX](#).

[CHALLENGE HOME](#)
[FAQ](#)
[RULES & TIMELINE](#)
[AWARDS](#)
[SPONSORS](#)
[PAST WINNERS](#)
[ABOUT THE CHALLENGE](#)
[FOR THE MEDIA](#)

For Residents | For Businesses | For Developers & Contractors | For Partners  
Our Work | News & Events | About the PDC | Resource Library | Contact Us | Site Map

© 2015 Portland Development Commission | 222 NW Fifth Ave | Portland, OR 97209-3859  
Phone: [503-823-3200](#) | Fax: 503-823-3368

follow us on:



# Startup PDX Challenge returns, offering \$15,000 grants and a focus on women and minorities



Startup PDX Challenge winners receive free office space for free in the New Market Theater, an 1872 building in Old Town. (PDC image)



By **Mike Rogoway** | [The Oregonian/OregonLive](#)

[Email the author](#) | [Follow on Twitter](#)

on May 20, 2014 at 6:31 AM, updated May 20, 2014 at 6:33 AM

The **Startup PDX Challenge** opened applications Tuesday morning for its second annual contest, offering \$15,000 grants and office space to as many as six startups in an effort to boost entrepreneurship in the city.

The Portland Development Commission launched the program a year ago, using public funds to publicize the city's entrepreneurial community and to encourage young companies to move into a part of the city the PDC was seeking to develop. Portland's economic development agency drew inspiration from similar programs in Massachusetts, Michigan, Missouri and Ohio.

The first startup challenge **drew 240 applications** for the free money and ultimately settled on six winners after a public vote and screening by judges from Portland's tech and investment community.



For its second go-around, Portland's startup challenge has boosted the size of its grants, adding more support from professional services firms, and picked a new location in Old Town to host the winning companies. (Last year's winners are housed in an office in inner Southeast Portland.)

It's also placed a priority on recruiting businesses run by veterans, members of minority groups and women – historically underrepresented in the startup community. The PDC has pitched the contest at events geared at a diverse audience and through organizations serving minority groups. It will also consider the makeup of the company as one factor in choosing a winner.

"You need to be a good candidate to win this, but we're also looking at the diversity of the founding teams," said Katherine Krajnak, small business development coordinator with the PDC.

Here's the rundown on this year's contest:

- Applications close June 23. Judges will choose semifinalists in August and pick finalists in early September. Winning companies move into their new offices Oct. 1.
- The PDC will host a public vote in the summer for semifinalists. The top vote-getter doesn't automatically get into the program, but will win a "merit stage" prize, which includes membership in entrepreneurship organizations, free educational programs and a reduced rate at a coworking space.
- The entry fee is again \$25.
- Winners receive a year's free office space on the third floor of the New Market Theater building, an 1872 brick building in Old Town. (It's down the hall from Voodoo Doughnuts' corporate office.)
- Winners also receive free legal, marketing, PR and HR services from various Startup Challenge sponsors.
- The PDC committed \$35,000 for tenant improvements to the 2,800-square-foot space. Combined with the \$15,000 grants for up to six winners, the contest could cost the PDC \$125,000. Last year, the PDC budgeted \$150,000 for the contest.

Additional detail is available on the [Startup Challenge's website](#) and [its list of FAQs](#).

-- **Mike Rogoway**; twitter: [@rogoway](#); 503-294-7699

[Moovel's new Portland office restores 125-year-old fixture in Old Town Chinatown](#)

[State audit critiques Oregon business incentives, data center tax breaks](#)

[Twitter CTO Adam Messinger quits](#)

[Microsoft says jumbo, Wilsonville-built computer finally on track as Google readies competitor](#)

[Lawmakers want to block Lattice Semiconductor's sale to Chinese investors](#)

[All Stories](#)

Registration on or use of this site constitutes acceptance of our [User Agreement](#) and [Privacy Policy](#)

© 2016 Oregon Live LLC. All rights reserved ([About Us](#)).

The material on this site may not be reproduced, distributed, transmitted, cached or otherwise used, except with the prior written permission of Oregon Live LLC.

**Community Rules** apply to all content you upload or otherwise submit to this site.

[Ad Choices](#)





benjamin barber <starworks5@gmail.com>

---

## [PLUG] TUESDAY: October PLUG Advanced Topics: Living Desktop Environment-Free

---

**benjamin barber** <starworks5@gmail.com>  
To: Portland Linux/Unix Group <plug@lists.pdxlinux.org>

Tue, Oct 21, 2014 at 1:27 AM

Just got an Intel Edison in the mail, it uses under a watt, I plan on making some solar powered Tor Servers.  
[Quoted text hidden]

---

### 2 attachments



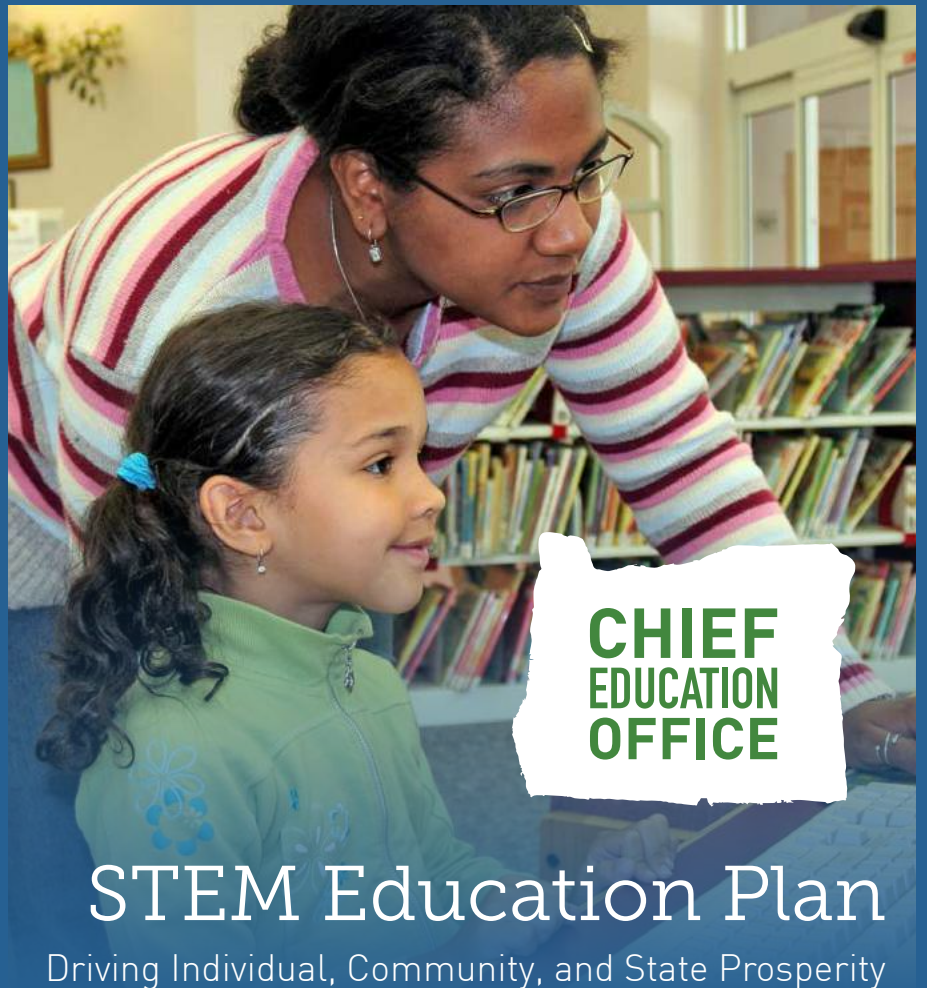
**HPIM3006.JPG**  
1310K



**HPIM3002.JPG**  
1381K



November 2016



**CHIEF  
EDUCATION  
OFFICE**

**STEM Education Plan**  
Driving Individual, Community, and State Prosperity



## A LETTER FROM THE GOVERNOR

In 1957, the world was captivated when a tiny Russian orb the size of a beach ball catapulted into outer space for the first time. As Sputnik quietly circled above, a roar grew back home in the United States as everyone from scientists to President Dwight D. Eisenhower called for bolstering American science and technology. In the decades after those appeals, the United States rose to the challenge to produce more highly skilled and trained scientists and engineers to advance our nation.

*Beep. Beep. Beep.* In many ways, Sputnik's first transmitted sounds triggered the alarm to America to wake up. Today, we are more aware than ever of the importance of quality Science, Technology, Engineering and Mathematics (STEM) education that allows Oregon and our nation to compete on a global level, and to tackle and solve society's most pressing problems. And, if we want a future where each Oregonian thrives, it is incumbent upon us as a community of political leaders, policymakers, educators, school administrators, the business community, and, most importantly, students, to shape the future of our state through educational opportunities that give our young learners the foundations they need to be ready for the jobs of tomorrow.

One of those students I think about is Shayla Edge, whom I met while she was a fifth-grader in Coos Bay. Shayla, a member of the local robotics team, OMG Ort Minimizing Gypsies (ort is another word for food waste), won first place at the Intel Oregon FIRST LEGO League qualifying tournament earlier in 2015. We talked about her career goals (she wanted to become a veterinarian) and her interests in schools (computers, coding, robots, and Legos). She also had some thoughts on how to better engage students, including hopes that businesses and community members assist with hands-on learning by sharing with students what they know.

"I definitely think that they should have more things like robotics – not just after-school things but things you can do during school," Shayla said. "More computer things and being able to use the stuff for yourself, not just having to look at it on a paper and have a teacher say, 'OK, now what's the answer?'"

Expanding STEM education opportunities, along with Career and Technical Education (CTE), will give more Oregon students the chance to participate in applied and engaging learning. My goal is that each Oregon student graduates with a plan for his or her future. STEM and CTE opportunities are important gateways to the world of work beyond high school, proven to keep students on track to graduate. The roar we heard nearly six decades ago to improve and expand science and technology is louder than ever. Let's heed the call and work together to provide more opportunities to our future generations of Oregonians who will one day lead, create, and innovate in our state.



*Kate Brown*

Kate Brown  
Oregon Governor

### Chief Education Office

775 Court Street NE

Salem, OR 97301

Phone: 503.373.1283

[www.education.oregon.gov](http://www.education.oregon.gov)





# STEM EDUCATION PLAN

November 2016

## CONTENTS

Introduction	/ 2
STEM Literacy for All	/ 3
Current Policies and Investments	/ 4
System Gaps and Related Results	/ 6
The Oregon STEM Investment Council	/ 7
STEM, STEAM, What does it all mean?	/ 7
The STEM Manifesto	/ 8
STEM Vision and Goals	/ 9
Goal #1 Inspiring and Empowering Students	/ 10
Goal #2 Ensuring Equitable Opportunities	/ 12
Goal #3 Supporting Educator Effectiveness	/ 13
Goal #4 Creating a Sustainable System	/ 15
Operationalizing the Plan	/ 16
Summary	/ 17
Appendix A: Relationship of CTE and STEM	/ 18
Appendix B: Oregon's STEM Indicators	/ 19
Appendix C: Baseline Data	/ 24
Appendix D: Math, Science, and Language Arts standards	/ 26
Appendix E: Oregon's STEM Hubs 2015-17	/ 27
Appendix F: Implementing the Plan — Proposed Actions	/ 28
Citations	/ 33



# Oregon's STEM Education Plan

## Driving Individual, Community, and State Prosperity

### VISION

Reimagine and transform how we educate learners in order to enhance their life prospects, empower their communities, and build an inclusive, sustainable, innovation-based economy. Oregonians of all races, economic status, and regions will develop the fundamental STEM-enabled skills and mindsets necessary to:

- Improve the prosperity of all individuals and communities across the state
- Become creative life-long learners who can adapt to changing social and economic conditions
- Fully contribute to an increasingly complex and technologically rich global society
- Address high-demand, competitive workforce and industry needs

We live in a time of exponential change – where we are flooded by information, where new technologies alter nearly every facet of our lives, and where the pace of global developments have an increasing impact on our communities and our planet. In this shifting context Oregon must prepare its learners for a future that we can't even imagine today, to solve problems that we are just beginning to fathom, using technologies that haven't yet been invented. In their various personal and occupational roles Oregonians will be called upon to understand these complex challenges, find solutions, adjust to change, innovate, work together, and build on the knowledge, enterprise, and achievements of previous generations.

Our students' education must enrich their lives, prepare them to successfully adapt to an unforeseeable future, and strengthen the economic prospects of Oregon's communities.

Right now, an economic resurgence infused by emerging technologies and scientific discoveries in every sector of the business landscape offers unprecedented job and career opportunities to Oregonians who've acquired the talent, passion, and initiative that come from studies in science, technology, engineering, and math (STEM). This is evident, as expected, in electronics, software, clean energy, and cutting edge biomedical research. But it's also true in more established sectors such as advanced manufacturing, precision agriculture, construction, and food processing.

In 2013, Oregon companies added more than 220,000 jobs, the majority of them STEM-related. That number is expected to increase in the foreseeable future.<sup>1</sup> In 2015 the state boosted job growth above 3 percent, making it the nation's 8th fastest growing economy.<sup>2</sup> One major driver of this job growth is Oregon's high-technology and software sectors, which pay average wages of \$100,000 per year. Additionally, Oregon's small-business innovators and entrepreneurs continue to propel the economies of Portland, Lane County, the North Coast, Central Oregon, the Gorge, Pendleton-Umatilla, and Southern Oregon. The state's wages have rebounded too, and are now growing at nearly 8 percent per year<sup>3</sup>. And, every region of the state is experiencing various degrees of recovery in population growth and economic activity, even though many rural regions are still in distress. Highly skilled and educated newcomers are attracted to the state's quality of life and innovative economy.

### THE RELATIONSHIP OF STEM AND CTE

Although STEM and Career Technical Education (CTE) programs have traditionally had different funding sources, delivery structures, and societal expectations, they are highly complementary. They share intended outcomes, applied learning approaches, and the preparation they offer for high-demand careers. (See Venn diagram, Appendix A.) In particular, both CTE and STEM engage and motivate students through hands-on, real-world learning; both hone creativity, critical thinking, problem-solving, communication, and teamwork; and, both prepare students for well-paying careers and successful futures.

Against this backdrop, there is a looming and growing disconnect between the demand for skills and talent in Oregon's economy and the number of young Oregonians emerging from our education system who possess such skills and talent, especially in the STEM disciplines. This disconnect represents a threat to the job prospects of our people, the prosperity of our communities, and the competitive capacity of our economy.

This needn't be so. Each one of Oregon's students has the potential to acquire and apply capabilities in the jobs demanded by a cutting-edge economy. The path to readiness for highly-skilled, high-paying jobs in this evolving economy needs to be extended to more of our students. Important student learning benchmarks bear out the urgent need and opportunity to effectively engage more of our students, especially students from communities of color and families in poverty. In 2015, 37% percent of all fourth graders scored at or above the proficient level for math in the National Assessment of Educational Progress (NAEP) as compared to 27% of our students eligible for lunch subsidy, 19% for our Latino students, and 17% percent for our African American students.<sup>4</sup>

---

Oregon cannot afford its growing talent shortages. By 2020, our economy will have almost 40,000 new job openings per year in STEM-related fields, and 94 percent of those will require a postsecondary credential.

---

clusters are healthcare (with 11,157 job openings), manufacturing (with 6,213 job openings) and information services (with 2,269 job openings). Within these industries, healthcare practitioners (with 3,813 job openings), computers and IT (with 2,171 job openings) and architecture and engineering (with 1,241 job openings) lead the technical and professional occupations.<sup>6</sup>

The demands of Oregon's economy for highly-skilled talent will continue to increase in the future, over and above existing shortages. By 2020, our economy will have almost 40,000 new job openings per year in STEM-related fields, and 94 percent of those will require a postsecondary credential<sup>5</sup>. Today, based on current labor market data, the state's three most in-demand industry

The bottom line: Oregon's growing economy requires a statewide strategy to prepare individuals for high-wage, high-growth STEM careers. Although there were still more than 117,000 unemployed workers in August 2015,<sup>7</sup> Oregon companies indicated that they cannot find qualified talent. This mismatch of talent and available jobs will only intensify if the skills and preparation gaps are not addressed.

## STEM Literacy for All

Let's be clear. The challenge before us is not simply about filling jobs and driving economic growth. More of our students will succeed in school when the connection between their learning and their future is clear and when there is readily-available access to opportunities to become more prepared to adapt and contribute to a rapidly evolving, technologically-rich society. Currently, 26% percent of our students do not graduate high school on time, limiting their future prospects and the opportunity to realize their full potential. STEM education provides a pathway to improve these prospects.



Oregon must act now. And, we must act together. We must strive to help each student discover and develop their talents and interest, achieve individual prosperity, and thrive as a citizen of Oregon and of the world. Each student must be equipped with the cross-cutting skills, attitudes, and dispositions needed to be successful in work, family, and community life. When asked what those skills, attitudes, and dispositions are, educators, parents, and employers have nearly identical responses. They say that what students need goes far beyond specific content knowledge to include critical thinking, problem solving, creativity, communication, flexibility, perseverance, risk-taking, adaptability, teamwork, and initiative.<sup>8</sup> In a society where information and academic content is readily searchable online, those who are able to analyze, synthesize, and apply that information in unique situations are the ones who will be in the highest demand, and will also be the change-makers of our future.

STEM and CTE education are a critical way that Oregon can fully prepare each student for success. These complementary approaches dramatically increase real-world relevance, have authentic demonstrations of student thinking, and provide opportunities for students to take charge of their learning. In STEM and CTE students become more engaged in the learning process. Engaged learners succeed. They are able to see pathways and opportunities before them, and stay on the path to graduate with a plan.

---

**Oregon must 1) double the number of 4th and 8th grade students proficient in math and science by 2025, and 2) double the number of STEM and CTE degrees and certificates by 2025.**

---

school experiences, and between education and employment. The applied learning approach of STEM and CTE motivates students, ignites their curiosity and creativity, encourages

problem solving, and instills strong work habits. STEM education equips Oregon students with the knowledge, skills, creative thinking, and dispositions that will help them thrive in a rapidly changing, technologically rich world.

## **Oregon's Current STEM Ecosystem: Robust STEM Goals, Policies, and Investments**

In 2011, Oregon leaders adopted the bold 40-40-20 goal: By 2025, 100 percent of Oregon's students will graduate from high school, with 40 percent going on to earn a bachelor's degree or higher, and 40 percent holding at an associate's degree or other technical credential.

STEM education plays an important role in achieving this statewide goal. Using the 40-40-20 goal as a springboard, the Oregon Legislature established the STEM Investment Council to 1) double the number of 4th and 8th grade students proficient in math and science by 2025 and 2) double the number of CTE-STEM degrees and certificates by 2025. The STEM Investment Council is also committed to achieving equity of access, opportunity, and attainment for historically underserved and underrepresented populations.\* These two goals were created to increase state productivity, reduce poverty, and meet the talent needs of businesses and communities.

To reach these goals, Oregon has aggressively invested in STEM policies and initiatives (see Figure 1). These include:

- In 2012, adopting College and Career Readiness standards to increase expectations – and the quality of teaching and learning – for Oregon students.
- In 2012, creating a statewide network of regional STEM Hubs and forging stronger industry partnerships.
- In 2013, establishing the STEM Investment Council.
- In 2014, adopting and implementing the Next Generation Science Standards (NGSS), which also integrate engineering standards and practices.
- In 2015, creating the Oregon Talent Council to help state agencies and education institutions develop talent to meet the growth and competitive needs of Oregon's traded sector and high-growth industries.

\* For the purposes of this plan, "historically underserved and underrepresented" populations in STEM include African American, Latino/Hispanic, Native American, Alaskan Native, and Pacific Islander. It also includes both rural and urban students in poverty, as well as women.

## OREGON'S REGIONAL STEM HUBS

As a key strategy to accelerate improved outcomes across the state, the Legislature created a statewide network of Regional STEM Hubs. These hubs devise local solutions to local needs. They coordinate regional communication and partnerships, improve key student outcomes, build capacity and sustainability for change, and encourage and support local and statewide engagement.

The Hubs are multi-sector partnerships that link local P-20 educators with representatives from workforce and economic development, community-based organizations, and business to transform STEM teaching and learning. (See STEM hub map, Appendix E.)

This coherent set of policies and strategic actions seeks to address the state's full education and workforce continuum.

In conjunction with its policies and actions, the Legislature has made considerable investments to increase student learning opportunities in CTE and STEM education, to increase degree and certificate production in STEM fields, and to increase participation and degree completion in STEM fields by students of color and women at public colleges and universities. In 2013, in addition to establishing the STEM Investment Council, the Legislature allocated \$8.5M to fund six regional STEM Hubs, model STEM Lab Schools, and a suite of STEM/STEAM/CTE grants focused on historically underserved and underrepresented students. In 2015 the Legislature doubled funding for CTE and STEM education, increasing its investment from \$17M to nearly \$35M, including investments for regional STEM Hubs, STEM innovation grants, CTE revitalization grants, Career Pathways, CTE summer programs, teacher development, and post-secondary support for historically underserved and underrepresented students. It also invested \$6.1 million in the Oregon Talent Council to support start-up programs at post-secondary institutions aligned with high-wage, high-growth sectors.

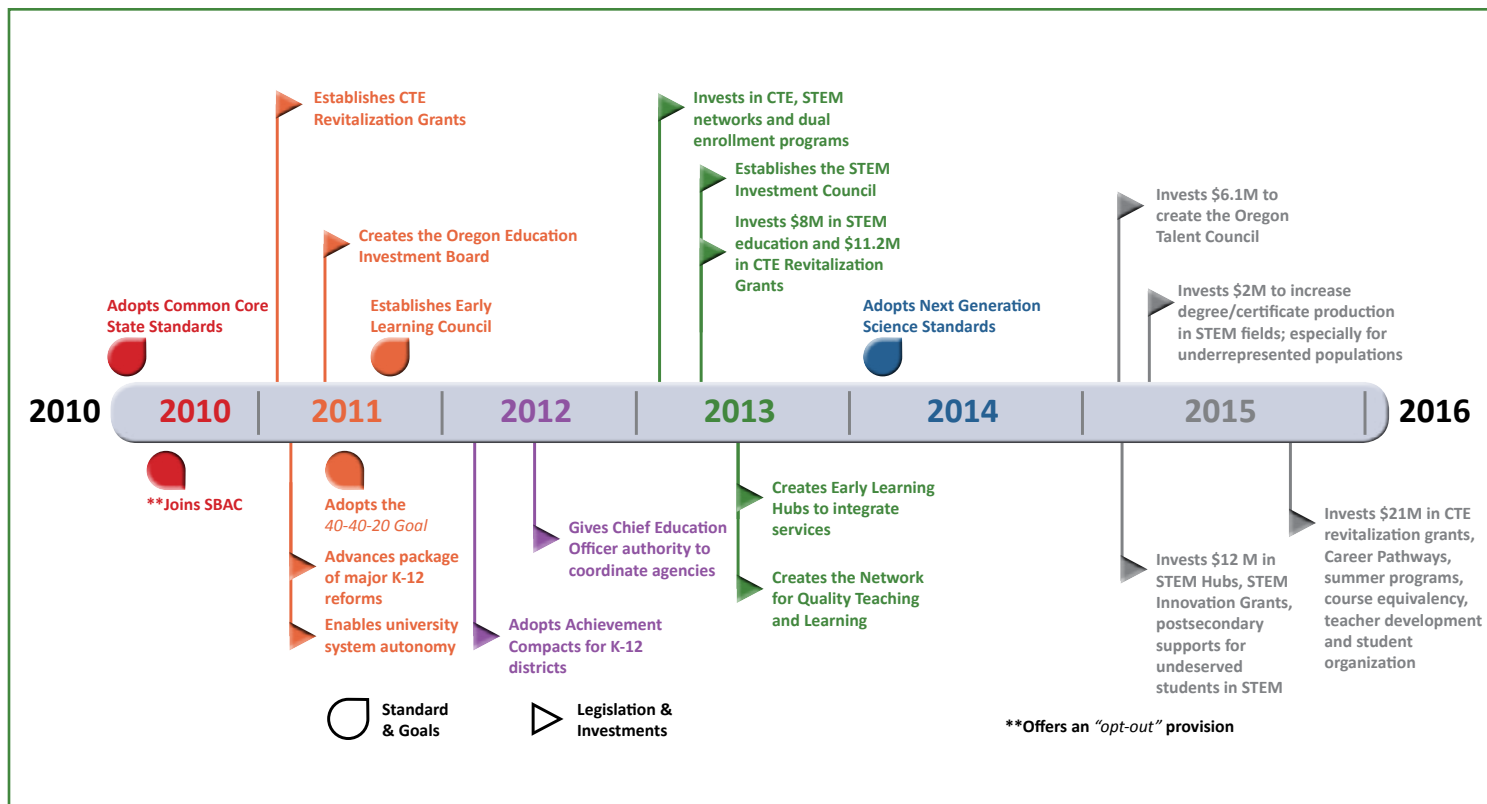


Figure 1: Oregon's STEM policies and investments

In 2015 the Oregon Higher Education Coordinating Council (HECC) implemented a new funding model, which incentivizes successful student completion of degrees with special emphasis on historically underserved students and degrees in high-priority fields. The Legislature also invested \$10M to create the Oregon Promise, which offsets tuition payments for Oregon's recent high school graduates who attend and pursue a certificate or degree at one of the state 17 community colleges.

Oregon is on the right track with its robust STEM goals, policies, and investments. But, it will take time for them to bear fruit and impact the state's results indicated in Figure 2, which are currently mediocre at best. Partners must acknowledge that a systemic commitment to STEM and CTE education is a marathon, not a sprint. Investments will likely result in a "hockey stick" growth pattern, where indicators remain flat for four to five years and then increase rapidly as investments start to benefit the first cohorts coming through.

## System Gaps and Related Results

Major gaps in Oregon's STEM education ecosystem are identified in the top half of Figure 2. The bottom half of the figure pinpoints Oregon's middling STEM results, which correlate with the gaps. Significant gaps affecting students include the amount of time each week that Oregon elementary students spend on science. Currently, the state ranks 50th. In addition, only 13 schools in the state offered AP Computer Science in 2013-14.

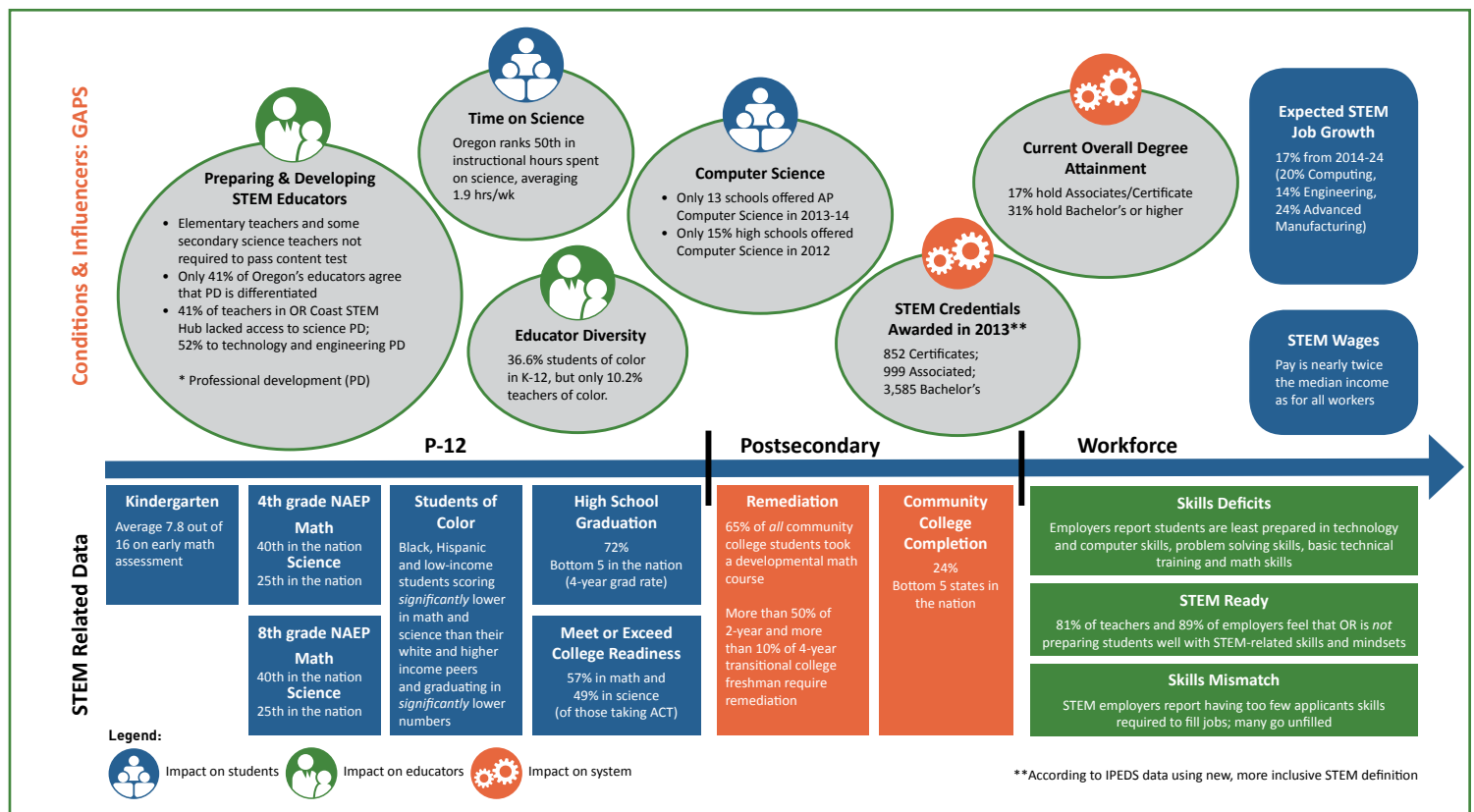


Figure 2: STEM gaps and data



National research attributes the lack of diversity in the STEM labor force in part to so few STEM role models of color in education. Gaps that impact educators include Oregon's low expectations for STEM teacher preparation and low quality professional development. Although Oregon places a premium on equity for its students, it has a small share of teachers of color (10.2 percent) relative to students of color (36.6 percent). However, according to the Oregon Educator Equity Report, the state is on track to meet a goal of increasing the number of diverse teachers.<sup>9</sup>

The state's mediocre STEM outcomes reflect the system gaps cited here. For instance, as shown in Figure 3, only 7 percent of Oregon's class of 2006 (41,655 sophomores in the 2003-04 school year) had achieved a STEM postsecondary credential by the spring of 2013. This example highlights a gap between the state's STEM degree production and STEM jobs that are available in Oregon.

If Oregon is to reach its laudable statewide 40-40-20 goal and its STEM-specific goals then it must stay the course to advance its previously enacted STEM policies and investments and expand efforts to target and close its gaps.

## The Oregon STEM Investment Council

Created in 2013, Oregon's STEM Investment Council has a legislative mandate to assist the Chief Education Officer with the development and implementation of a long-term strategy to advance the state's STEM goals. This plan represents the Council's recommended suite of long-term strategies.

To jumpstart its work, the STEM Investment Council convened a statewide STEM Leadership Summit in 2014 to determine systemic STEM barriers across the state's P-20 education and workforce system and identify solutions to remove those barriers. The STEM Investment Council used those findings to inform its recommendations for the Governor's STEM budget for fiscal years 2015-17. Over the last several months, the Council and the Chief Education Office have been working with educators, diverse community groups, non-profits, and other partners to articulate a vision, belief statements, and driving goals for STEM education in Oregon. In particular, this vision emphasizes equity of opportunity, access, and attainment for every Oregon student consistent with Oregon's Equity Lens.

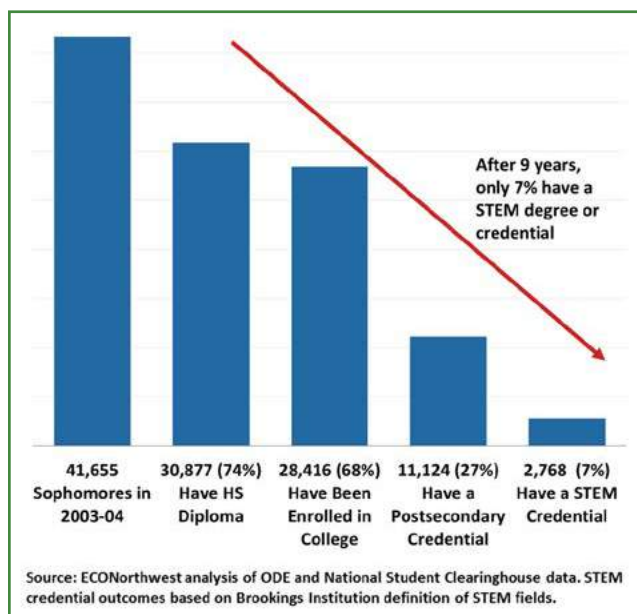


Figure 3: Class of 2006 STEM Outcomes by spring 2013

## STEM, STEAM, What does it all mean?

This strategic plan is acronym agnostic. Whether you call it STEM, STEAM, STREAM, STEMM, METS, i-STEM, e-STEM, TEAMS, S<sup>2</sup>TEM, MESH<sub>T</sub>, or other associated acronym, Oregonians generally agree on the fundamental principles and values put forward in the following STEM Manifesto. These guiding belief statements were created by the Council's strategic planning committee as the foundation for this plan, and they strive to communicate a vision of STEM education through which we ignite an inclusive renaissance of curiosity, creativity, wonderment, innovation, and the joyful pursuit of life long learning and talent discovery. In this light STEM can be viewed as "applied curiosity"—the insatiable desire to know and wonder, coupled with a creative drive to make, invent, and contribute to the betterment of humanity.



## The STEM Manifesto

- 1) **All people have creative potential.** Our students are not passive consumers of information. Adults must provide the space for them to be active participants in their own learning and construction of knowledge. Their inherent talents, interests, and creativity have only to be unleashed.
- 2) **Each student deserves an opportunity to prosper.** Too many students who reflect the racial and ethnic diversity of Oregon, too many from families navigating poverty, too many from rural communities, and too many young women are not afforded a path into high-wage, high-demand STEM professions. No student's potential, nor dreams, should be left unrealized.
- 3) **Diversity is our strength.** Differences of gender, ability, race, ethnicity, and culture provide critical and diverse perspectives and voices to address today's complex challenges. Innovation and solutions emerge where different ideas and cultures interconnect.
- 4) **Engaged learners succeed.** How we teach our students is as important as what we teach them. We must create meaningful learning experiences that empower all students to embrace their curiosity, take ownership of, and joy in their learning, and become lifelong learners.
- 5) **Education is a collective responsibility.** Effective STEM learning takes place both in and outside of classrooms. Everyone in our community is a potential educator. We need to engage with leaders, institutions, and volunteers in our communities who want to help our young succeed.
- 6) **Innovation is the cornerstone of prosperity.** STEM education is not just about filling jobs, but also about creating jobs. Building an innovation-based economy is essential for the long-term competitiveness and prosperity of Oregon and its people.
- 7) **Learning takes courage, persistence, and humility.** Pushing the boundaries of one's understanding requires us to value curiosity, risk failure as a stepping stone to success, prize questions over answers, and see learning as an unending journey.
- 8) **STEM skills are essential skills.** Advancements in science, technology, engineering, and mathematics are transforming nearly every facet of life and work. Not only is STEM literacy integral to the requirements of daily life, civic engagement, and employment, so are STEM capabilities in analyzing needs, taking initiative, organizing effort, and solving problems.
- 9) **STEM learning is cross-disciplinary.** It is the interconnectedness of ideas that enables people to integrate new learning with their prior experiences. STEM by its nature synthesizes analytical and creative thinking across multiple areas of human knowledge and expression. It is a powerful tool that sits at the crossroads of the sciences, arts, and humanities.
- 10) **The best way to learn STEM, is to DO it.** STEM education is not about retaining facts or disconnected bits of information. Purpose-driven learning challenges students to pursue deeper questions, and to identify and solve problems that are relevant and meaningful.

## STEM VISION FOR OREGON





Reimagine and transform how we educate learners in order to enhance their life prospects, empower their communities, and build an inclusive, sustainable, innovation-based economy. Oregonians of all races, economic status, and locations will develop the fundamental STEM-enabled skills and mindsets necessary to:

- Improve the prosperity of all individuals and communities across the state
- Become creative life-long learners who can adapt to changing social and economic conditions
- Fully contribute to an increasingly complex and technologically rich global society
- Address high-demand, competitive workforce and industry needs

### Oregon's STEM Goals

Summarized below are four primary goals to spur interest, attainment, and opportunities for learners through STEM education. Each of these is detailed more fully in terms of measurable priority outcomes, a narrative rationale for each area of focus, and a summary of initiatives, if implemented, will achieve the targeted outcomes.

#### Goals

- 1)  Inspire and empower our students to develop the knowledge, skills, and mindsets necessary to thrive in a rapidly changing, technologically rich, global society.
- 2)  Ensure equitable opportunities and access for every student to become a part of an inclusive innovation economy.
- 3)  Continuously improve the effectiveness, support, and the number of formal and informal P-20 STEM educators.
- 4)  Create sustainable and supportive conditions to achieve STEM outcomes aligned to Oregon's economic, education, and community goals.



**Goal #1:**

**Inspire and empower our students** to develop the knowledge, skills, and mindsets necessary to thrive in a rapidly changing, technologically rich, global society.

**GOAL #1 PRIORITY OUTCOMES**

- 1) By 2020, Oregon's high school completion rates across those schools implementing STEM and CTE applied learning strategies for all students will increase to at least 85%.
- 2) By 2020, Oregon elementary classrooms will increase time on science and engineering by 50% from 1.9 hours per week to exceed the national average of 2.7 hours per week,<sup>10</sup> using lessons and approaches consistent with the Next Generation Science Standards (NGSS).
- 3) By 2020, Oregon will adopt computer science standards and increase the number of high school computer science related course offerings by at least 50%.
- 4) By 2020, Oregon will have expanded participant hours in high-quality afterschool STEM programs by at least 25% with a special emphasis on historically underserved and underrepresented students.



*Why must Oregon focus on STEM learning opportunities in the early grades?* The early years are critical for students to develop authentic interest in and experience with STEM. Through discovery, discourse, inquiry, and play, children learn to observe natural phenomena, become pattern sleuths, shape and defend an argument, and use problem-solving tactics.<sup>11</sup> A recent random assignment study by the Center for Research in Educational Policy supports the claim that strong inquiry-based science experiences strengthen K-8 science outcomes, even for students who are typically underrepresented in the STEM fields.<sup>12</sup> A landmark 2007 study also showed that early math skills are one of the best predictors of later academic success in both math and language arts.<sup>13</sup> Early STEM experiences are also vital because students get hooked on STEM early. Recent research suggests that students who ultimately decide to take advanced science classes and pursue postsecondary STEM fields tend to get interested in STEM and make their choices as early as middle school, or even before.<sup>14</sup> For girls and culturally and linguistically diverse students, early exposure to STEM experiences proves to be a key factor in deciding to pursue STEM coursework and careers.<sup>15</sup> Providing students with project-based, hands-on, and career-influencing science experiences takes teacher expertise, resources, and time. Oregon must ensure that all of its students receive strong STEM education early so they are prepared for college, career, and life.

*Why are math and science standards important?* The applied and interdisciplinary nature of STEM learning is a powerful means for fully implementing the Next Generation Science Standards (NGSS) and the Common Core State Standards in Mathematics (CCSS-M) through integrated approaches. These academic standards are not simply about what to teach, they also put forward a vision that challenges educators to transform how they teach. Instead of an emphasis on memorization and recall of information, students should be engaging in solving real-world problems and employing the "practices" used by STEM professionals (see Appendix D).

*Why do Oregon students need access to computer science courses?* Some of state's fastest growing job clusters are in technology and software. Currently, Oregon has 8,058 open computing jobs, with average salaries of \$81,000 – significantly higher than the average salary in the state. In 2013, Oregon had only 355 computer science graduates (and only 11 percent of those were female). In 2015, Oregon had 290 high school students take the AP Computer Science exam. Of those

students, 18 percent were female, 11 students were Latino, and four students were African American. Only 15 percent of Oregon's high schools offered at least one coding course in 2012.<sup>16</sup> Only 13 schools offered the AP Computer Science in 2013-14.<sup>17</sup>

*Why is out-of-school STEM learning important?* Informal STEM learning is just as important as formal STEM learning. Only 18.5% of a typical K-12 student's waking hours are spent in a formal classroom setting, and many scientists and engineers point to out of school experiences as being instrumental in shaping their career choices.<sup>18</sup> These community-based learning opportunities have been shown to raise student confidence and classroom achievement in STEM and generate student interest in pursuing STEM studies and careers.<sup>19</sup> Types of informal STEM learning programs include afterschool programs, summer camps, and in-school activities provided by a community-based organization or volunteers. They also include participation in activities at institutions such as science museums, zoos, parks, local universities, and research centers. Unfortunately, good, objective data that differentiate those programs having the greatest impact do not exist at the state and national levels.<sup>20</sup>

### Key initiatives to achieve Goal #1 include:

- Increase time on science in elementary and middle school, consistent with the Next Generation Science Standards (NGSS) and integrating it with other subject areas.
- Increase student digital literacy skills, use of technology to deepen learning, and their access to applied computer science courses.
- Increase access to high quality out-of-school STEM-CTE learning opportunities that inspire student interest and mitigate summer learning losses.
- Engage parents and early learning educators to emphasize playful inquiry approaches that promote multi-sensory, interactive environments involving various forms of both guided and unstructured play and explorations.
- Increase the use of teaching strategies that challenge students to be creative, resourceful, persistent, and collaborative through solving real-world problems.
- Increase the use of culturally relevant, place-based

contexts as a basis for student inquiry and applied learning projects.

- Increase interactions of students with STEM professionals and community experts to develop students' aspirations and personal STEM identities as life-long learners.
- Increase the availability and attainment of college-level STEM credits and CTE credentials while in high school.
- Increase the development and acceptance of industry-recognized credentials based on demonstrated skills, including traditional and nontraditional certifications.
- Increase student interest, understanding, and success in mathematics through applied learning approaches and proficiency-based advancement.



**Goal #2:**

**Ensure equitable opportunities and access** for every student to become a part of an inclusive innovation economy.

**GOAL #2 PRIORITY OUTCOMES**

- 1) By 2018, work with communities of color to establish volunteer networks of STEM employees of color to act as role models in and out of school.
- 2) By 2020, double the number of historically underserved and underrepresented STEM students who are enrolled in post-secondary STEM-related programs.
- 3) By 2025, double the number of historically underserved and underrepresented students attaining a STEM-related degree or credential.

*Why a specific goal on equity?* Oregon faces significant opportunity and attainment gaps across its cradle to career education ecosystem, particularly among its students of color and students from families in poverty. The state must close these gaps.

Increasing diversity in the STEM labor force is both a moral and economic imperative. As indicated in the STEM Manifesto, diversity is an asset in addressing today's complex challenges. Yet persons of color and women account for far fewer of the country's STEM job holders than their percentage of the general population. Nationally, just 2.7 percent of African Americans, 3.3 percent of Native Americans and Alaska Natives and 2.2 percent of Hispanics and Latinos who are 24 years old have earned a first university degree in natural sciences or engineering.<sup>21</sup> These students face an expectation gap, an opportunity gap, an information gap, and an inspiration gap. Key systemic inequities include insufficient access to school programs such as computer science, AP courses, and CTE in and out of classrooms; limited student exposure to diverse STEM faculty and out-of-school role models; and biased messaging and expectations.

Students from rural areas and families in poverty also often experience limited access to STEM opportunities. Over 38 percent of Oregon's school districts are classified as rural.

Rural students are also less likely to enroll in and achieve a postsecondary education. In the 2010 ASCD Educational Leadership issue, author James A. Bryant, Jr. reported that over 60 percent of residents in rural areas live below or just above the poverty line and 68 percent of rural schools face significant achievement gaps in mathematics.<sup>22</sup>

*How can we increase the attainment of post-secondary degrees and credentials?* Targeted strategies and supports increase the likelihood of success for students historically underrepresented in STEM studies. At the postsecondary level, those STEM-specific strategies include exposure to STEM courses in conjunction with a combination of advising, co-requisite remediation and gateway-course redesign. To persist to a STEM certificate or degree, students must see how their coursework applies to the real world. Research shows that one of the most effective strategies is access to undergraduate research and/or internships during the freshman and sophomore years of postsecondary. To help bridge this gap, postsecondary institutions must forge authentic partnerships with business and industry. Employers can influence programs and curriculum, provide technology and equipment or participate on advisory boards.

*Why are diverse STEM role models important?* One of the most effective ways to encourage students to consider nontraditional careers is to introduce them to diverse role models, particularly role models with whom they are able to relate. Providing diverse role models challenges stereotypes around careers where some groups may traditionally be underrepresented. Women and people of color are underrepresented in most STEM fields, including engineering, physics, and computer science. But when students are introduced to female engineers, or black computer scientists, their perceptions of who "belongs" in STEM are transformed.<sup>23</sup>



### Key initiatives to achieve Goal #2 include:

- Increase the number of female and role models of color for students who are underrepresented in STEM, including more STEM and CTE teachers of color.
- Increase access to alumni and professional networks for students of color.
- Increase student and family access to understandable, up-to-date market data regarding high-wage, high-demand career opportunities by improving student advising, career counseling services, and guidance tools.
- Increase the number and quality of support services and pre-college transition programs for students historically underserved and underrepresented in STEM.
- Increase needs-based financial support for first-generation and historically underrepresented students pursuing high-wage, high-demand credentials.
- Increase STEM-related CTE programs of study in high-demand fields.
- Increase access to quality, STEM-rich early learning environments for historically underserved and underrepresented families.
- Increase student and family access to culturally relevant, community-based STEM and CTE programs that build upon local assets.
- Increase paid STEM and CTE internships, work-based and service learning opportunities, and undergraduate research opportunities in high-demand fields.



### Goal #3:



**Continuously improve the effectiveness, support, and the number of formal and informal P-20 STEM educators.**

### GOAL #3 PRIORITY OUTCOMES

- 1) By 2018, create and populate an online repository of high-quality instructional resources and concrete examples that engage learners in rich, authentic applications of STEM concepts.
- 2) By 2018, establish a STEM leadership academy to work with school principals, superintendents, teacher preparation faculty, and teacher leaders.
- 3) By 2020, provide high-quality professional development opportunities in partnership with local STEM employers to at least 50 percent of Oregon's K-12 STEM educators, leveraging Oregon's Regional STEM Hubs where possible.

*Why focus on educators?* Educators have the greatest impact on student success across the education continuum, both inside and outside of classrooms. In Preschool to grade 12 (P-12), for instance, research indicates that a classroom teacher's effectiveness is more important—and has more impact on student achievement—than any other factor controlled by school systems, including class size or the school a student attends.<sup>24</sup>

Researchers agree strengthening educator effectiveness is the most efficient way to boost academic achievement and they believe rigorous, cutting-edge professional development can play a key role in improving educator practices.<sup>25</sup> This type of professional learning is job-embedded (integrated into the work teachers do on a day-to-day basis), collaborative, incorporates coaching and technology, and takes into account the school context.<sup>26</sup> However, today only 51 percent of Oregon's educators agree that professional development is differentiated to meet their individual needs.<sup>27</sup> In addition, access to high-level professional development is often lacking across the state. For instance, 41 percent of surveyed teachers in Oregon's Coast STEM Hub lacked adequate access to professional development in science teaching. Fifty-two percent lacked adequate access to professional development in technology and engineering education.<sup>28</sup>



Oregon's Regional STEM Hubs are currently engaging partners from business and higher education to expand and improve professional development offerings. For instance, a STEM-related business might open its laboratories to local teachers and given them an opportunity to work alongside laboratory technicians, helping them better understand the culture of applied STEM disciplines and transfer that back to the classroom. The goal is to leverage STEM Hubs and their partnerships to reach 50 percent more of Oregon's teachers over the next five years.

Thoughtful, skillful teachers who have an understanding of how STEM knowledge and skills are applied in the workplace are the backbone to delivering innovative STEM instruction across elementary and secondary classrooms. They drive differentiated, integrated STEM learning experiences, and develop and deliver hands-on, project-based instruction for learners of all ages. Teachers must be supported by strong instructional leaders who understand the benefits of STEM education beyond content knowledge. Principals need to establish cultural and environmental conditions to take risks and to shift toward more applied, integrated, and place-based learning.

*Why focus on instructional resources?* Most formal educators are faced with tremendous demands on their time and have little to no opportunity to develop curricular units from scratch without support. Furthermore, the kind of instructional units envisioned in this plan—utilization of project-based learning approaches, based in rich community contexts, culturally informed, and making connections with STEM employees—requires time, expertise, and energy well beyond traditional curriculum development. Current publishers have limited, often perfunctory, resources to support this kind of integrated unit that draws connections to multiple disciplines, and empowers students to drive their own learning. Those publishers that do have quality units and materials are often too expensive for districts to afford. However, through the network of Regional STEM Hubs, Oregon educators are working alongside industry volunteers to create such units. There are also several good online sources, but they often require significant effort to determine which are of highest quality and most relevant to the students. These ideas and resources need to be made more readily available to Oregon educators at all levels.

*Why focus on school leaders?* Leaders determine the culture of their organizations and institutions. The same research that has shown that teachers have the greatest impact on student success in the system, also shows that building principals have the next greatest impact. In schools where high quality STEM is taking place, principals and teacher leaders have worked together to create a positive, student-centered culture where educators work collaboratively and are encouraged to take thoughtful risks in their teaching approaches in order to meaningfully engage students and community members.

### **Key initiatives to achieve Goal #3 include:**

- Increase time and funding for educators to engage in professional learning opportunities regarding effective STEM and CTE teaching strategies, including applied, project-based approaches, and which develop their own positive STEM identities.
- Create a repository of high-quality instructional resources and concrete examples that engage learners in rich, authentic applications of STEM concepts.
- Increase principal and administrator understanding of the importance of STEM and CTE, and the power to transform learning outcomes for students and educators.
- Increase the effective implementation of Oregon's math and science standards.
- Increase time and resources for educator-to-educator and educator-industry collaborations to implement promising STEM and CTE instructional practices.
- Support teacher preparation programs that promote effective, standards-informed, STEM teaching strategies and experiences with STEM and CTE employers.
- Increase opportunities for STEM and CTE educators to experience STEM in industry and research as part of their ongoing professional development.
- Increase the talent pool of qualified STEM and CTE teachers, and reduce barriers for STEM and CTE professionals to transition into teaching.

**Goal #4:**

**Create sustainable and supportive conditions** to achieve STEM outcomes aligned to Oregon's economic, education, and community goals.

**GOAL #4 PRIORITY OUTCOMES**

- 1) By 2020, pass state policies that enact a reliable and sustainable funding mechanism to adequately support the state's STEM and CTE investments and provide flexibility across biennia to enable longer-term investments to the field.
- 2) By 2018, create a data dashboard that publicly monitors Oregon's progress in key STEM indicators that comprise the state's connected STEM, CTE, and workforce ecosystem.
- 3) By 2020, approve and implement common processes and measures across institutions for placement in mathematics, and realign grades 9-14 mathematics curriculum to better reflect differing degree/certificate program needs.

Oregon must continue to stay the course and build upon the good work it has done since 2011. This calls for continued strategic investments in STEM and CTE. Additionally, Oregon must continue to identify key metrics and use consistent definitions for STEM across its education ecosystem. The STEM Investment Council believes in holding itself and the system accountable for making progress and using data to spur stakeholder dialogue and continually drive improvement.

State agencies that comprise the education and workforce ecosystem must also fully implement the Brookings definitions of STEM careers<sup>29</sup> and STEM degrees.<sup>30</sup> Brookings calls attention to two STEM economies: the professional STEM economy that is linked to graduate school education and the second STEM economy that draws from high schools, workshops, vocational schools, and community colleges. The second STEM economy will hold half of all STEM jobs – and pay 10 percent more than non-STEM jobs with similar education requirements.

With the STEM goals, policies, and investments Oregon has already pursued, the state is poised to move the needle on its STEM results.

**Key initiatives to achieve Goal #4 include:**

- Develop a sustainable funding and policy environment for STEM and CTE that provides reliable, seamless, and sufficient support across biennia.
- Create a data dashboard that publicly monitors progress on key STEM indicators of the state's connected STEM-CTE education, economic, and workforce system.
- Expand and support the network of Regional STEM Hubs and CTE Coordinators to increase adoption and spread of effective practices, leverage shared resources, and provide critical feedback to inform policies and investments.
- Improve the quality and relevance of postsecondary mathematics placement processes and align course content to relevant degree/certificate program needs.
- Build the capacity, effectiveness, and connectivity of STEM-related professional networks for educators, administrators, community-based non-profits, and other partners.
- Work with the Oregon Department of Education and the Oregon Science Teachers Association to include accountability in science as part of the state's plan for the Federal Every Student Succeeds Act.



- Work with STEM and CTE employers to increase the number of employee volunteers engaging in education programs both in, and out of school.
- Partner with private and corporate philanthropy to align investments to shared outcomes, address gaps in services, and increase quality of programs.
- Streamline grant funding mechanisms—lowering administrative burden of recipients, while increasing accountability to attainment of results.
- Provide “start-up” as well as ongoing institutional funding to incentivize postsecondary programs aligned to high-wage, high-demand industry needs.
- Publicly showcase individuals, classrooms, and organizations that are effective in achieving positive STEM outcomes.
- Create and implement a community engagement campaign to increase interest and support for STEM, particularly among traditionally underrepresented populations.

## Operationalizing the Plan

Achieving the changes outlined in this plan will only occur if we are able to harness the collective energy, wisdom, and assets in our educational system, businesses and industry, lawmakers, civic leaders, non-profits, parents and families, private philanthropy, and others. During the vetting of earlier drafts of this plan, we asked a variety of stakeholders what each of these constituents could do to take shared responsibility for operationalizing this plan and transforming outcomes for our students and communities. A summary of these calls to action are included in Appendix F.



## Summary

This strategic plan consists of a comprehensive set of strategies and initiatives to strengthen and transform the STEM education ecosystem in Oregon. It is formally submitted to the Chief Education Officer as partial fulfillment of the statutory duties of the STEM Investment Council. Through the duties of that Office, these recommendations are also made by extension to the Governor, the State Board of Education, the Higher Education Coordinating Commission, the Early Learning Council, the Youth Development Council, and the Teacher Standards and Practices Commission.

Consistent with this plan the STEM Council will continue to monitor the impact of specific investments as well as changes reflected in the indicators identified in Appendix B. This plan will be updated every two years following a thorough assessment of the changing operating environment in Oregon and input from a broad representation of stakeholders. Each biennium, the STEM Investment Council will provide a report to the Legislature on progress against these indicators, as well as specific policy and investment recommendations arising from the vision and priorities of this plan.

The Oregon STEM Investment Council also thanks the Oregon Community Foundation for generously supporting the development of this plan, Oregon Learns and Education First for collaboration on this work, and to all of the participants of focus groups from communities throughout this great state.

Respectfully submitted,

Jim Piro  
Chair, STEM Investment Council

### OREGON STEM INVESTMENT COUNCIL

Jim Piro, Portland General Electric (Council Chair)  
Celeste Edman, Lunar Logic  
Romanna Flores, Intel Corp.  
Herb Fricke, Akana  
Lisa Graham, Alkemy Innovation  
Dwayne Johnson, ScaleUp Partners  
Eric Meslow, Timbercon, Inc.  
Thompson Morrison, Innovate Oregon

### CHIEF EDUCATION OFFICE

Lindsey Capps, Chief Education Officer  
Mark Lewis, STEM & CTE Policy Director  
Krissi Hewitt, Regional Education Partnership  
Policy Advisor

### ADVISORS

Jim Fong, Rogue Workforce Partnership  
Kristen Harrison, Portland Metro STEM Partnership  
Bradford Hill, Southridge High School,  
Beaverton School District  
Jessica Howard, Portland Community College, SE Campus  
Kimberly Howard, Portland General Electric  
Jill Hubbard, Tigard-Tualatin School District  
Craig Hudson, Garmin AT  
Leslie Garcia, Oregon Health Sciences University  
Kali Ladd, Kairos PDX  
Andrew McGough, Worksystems Inc.  
Kyle Ritchey-Noll, Oregon Business Council  
Terrell Smith, Oregon Computer Science  
Teachers Association  
Martin Storksdieck, Center for Research on Lifelong STEM  
Learning, Oregon State University  
John Tapogna, ECONorthwest  
Tom Thompson, Oregon Department of Education  
Beth Unverzagt, Oregon Afterschool for Kids

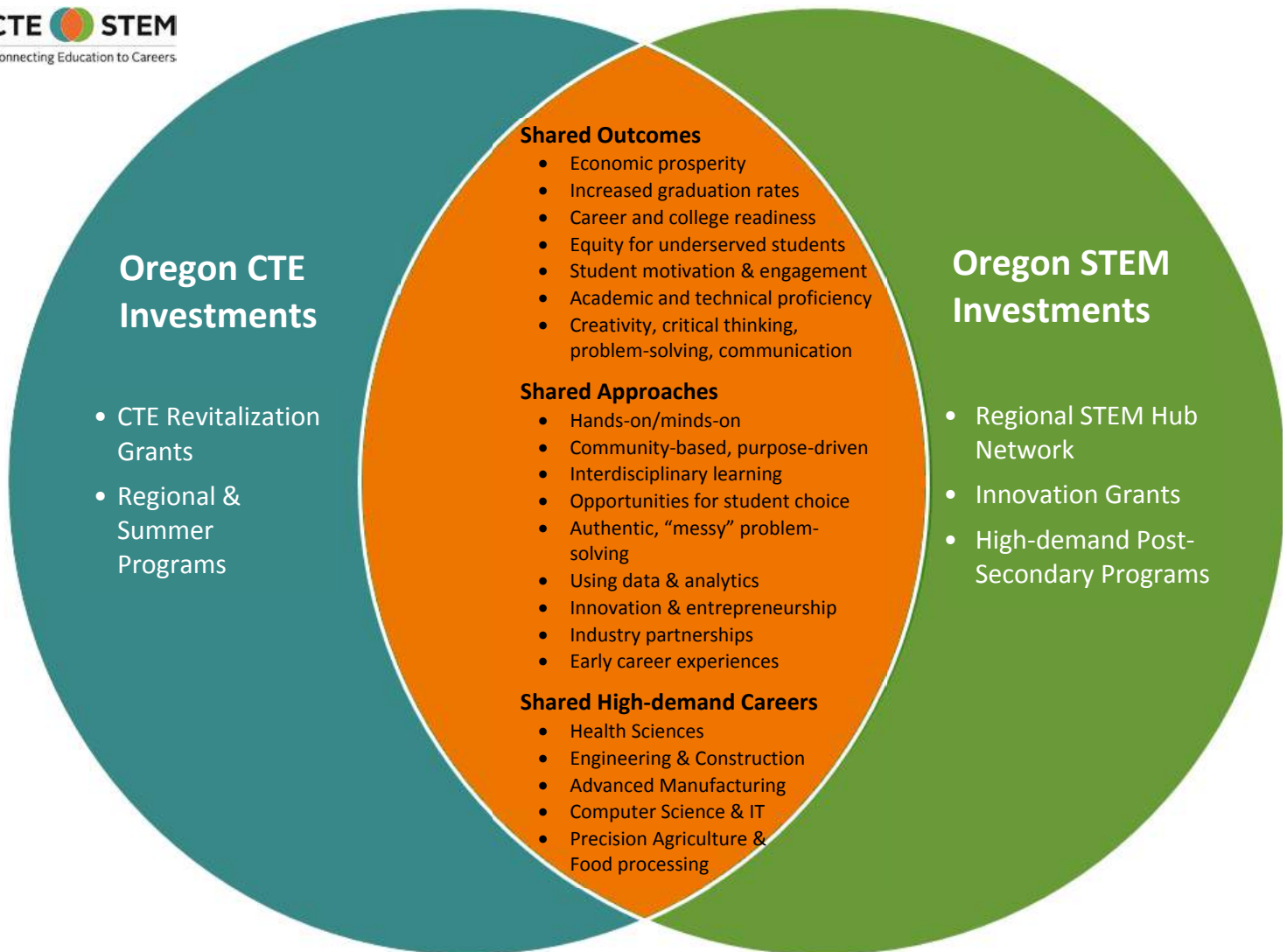
## APPENDIX A: RELATIONSHIP OF CTE AND STEM



Oregon Education Investment Board



### Connecting Education to Careers





## APPENDIX B: OREGON'S STEM INDICATORS

The following table contains overall system metrics that will enable the STEM Investment Council and the State to monitor and communicate relevant outcomes for STEM education. These indicators are not fully inclusive of metrics that relate more specifically to individual investments recommended by the Council. While there are numerous possible indicators to track, this list represents an initial set, which will be reviewed on a 2-year cycle (at a minimum) and modified based on changes to available data or additional analysis. These indicators will form the basis for semi-annual reporting to the Legislature, the State Board of Education (SBE), and the Higher Education Coordinating Committee (HECC). *To the extent possible, each indicator will be disaggregated by race, gender, socio-economic status, and region.*

Table 1. Proposed STEM indicators to monitor student access, interest, preparedness, and attainment.

Proposed STEM Metric	Rationale	Definition	Possible Source
Elementary time on science [Access]*	Between 1988 and 2008, the amount of instructional time devoted to science instruction in elementary schools has dropped to an average of 2.3 hours per week in the U.S. The decreased time spent on science instruction is correlated with lower scores on the science portion of the National Assessment of Educational Progress. The most recent data from 2009 shows that is that 25% of Oregon's 4th grade teachers report spending less than one hour on science a week and 60% report less than 3 hours per week. These figures are the lowest in the country.	Average hours/week at each grade level, aggregated.	Teacher self-report on the NAEP.  Expanded TELL survey.
4th Grade math and science achievement scores [Preparedness]	Performance on nationally normed assessments in math and science provide a helpful comparison with other States. This is also a legislative requirement for the STEM Council. While the NAEP assesses mathematics every 2 years and science every four years, Oregon's Smarter Balanced assessment for mathematics will provide an annual indicator to monitor progress and comparison to other Smarter Balanced states.	% of students in 4th grade who are proficient or advanced in mathematics and science	National Assessment of Educational Progress (NAEP). Annual state Smarter Balanced assessments in math will also be used.

\* 3rd-grade reading and early numeracy are also critical leading indicators of success. The Council will work with agencies in the coming biennium to determine how best to measure and report those metrics.



Proposed STEM Metric	Rationale	Definition	Possible Source
Middle school interest in STEM (Interest)	Research has shown that expressed interest in science in upper elementary and middle school grades is a better predictor of future career trajectories than academic performance or course-taking patterns. It is assumed that this also extrapolates to STEM fields as a whole.	% of students self-reporting interest in STEM futures.	Student interest surveys as part of investment evaluation instruments. Consider including in a statewide survey of student engagement.
Historically underserved and underrepresented students participating in out-of-school STEM experiences and programs (Access)	During the K-12 academic years, students typically spend about 18.5% of their waking hours in a formal school environment. Out-of-school STEM experiences and programs often create more learner-centered and personalized STEM learning experiences that can deepen understanding of STEM phenomena, provide opportunities to think critically, as well as increase interest. Examples include afterschool clubs (e.g., science, Robotics), museums, science centers, aquariums, or field trips to natural areas. A recent study indicates that by 6th grade, students in poverty have experienced 6000 less hours of access to STEM rich learning contexts than their upper and middle class peers. Equitable access to STEM opportunities is included as one of Governor Brown's main priorities for STEM education.	Ratio of historically underserved and underrepresented students participating compared to total students participating.	Program reporting of student self-declaration through Hubs, state grant recipients, OregonASK, and private philanthropic grantees.
8th grade performance on math and science achievement scores (Preparedness)	Performance on nationally normed assessments in math and science provide a helpful comparison with other States. This is also a legislative requirement for the STEM Council. While the NAEP assesses mathematics every 2 years and science every four years, Oregon's Smarter Balanced assessment for mathematics will provide an annual indicator to monitor progress and comparison to other Smarter Balanced states.	% of students in 8th grade who are proficient or advanced in mathematics and science	National Assessment of Educational Progress (NAEP). Annual state Smarter Balanced assessments in math will also be used.

Proposed STEM Metric	Rationale	Definition	Possible Source
Students declaring a postsecondary STEM interest at high school (Interest)	Interest indicated in high school provides a sense of “demand” for post-secondary studies in STEM. This may provide valuable interim data when compared with middle school interest, as well as eventual enrollments and completions in post-secondary STEM studies.	% students selecting interest in a STEM-related field compared to total students taking PSAT	Aggregated self-report on PSAT. Additional data from ACT and SAT will also be gathered, but suffer from more selection bias.
STEM-CTE participation in programs of study (Interest)	Students often have several possible pathways to select in high school. If they choose to take at least one credit (usually two semester courses) in a STEM-related CTE program of study, we anticipate that this indicates an interest in a STEM-related career. Thus, this should provide a sense of talent supply upstream of the post-secondary system.	% of total students earning at least one credit in a STEM-related CTE program of study	ODE course data
Percentage of students taking the AP STEM tests (Access)	While this may provide some indication of interest, it will provide a sense of disparities in access and expectations across demographic groups. Analysis will also include availability of AP courses and enrollments by region using ODE data.	% of students by demographic group taking AP STEM tests	College Board reports. Supplemented by ODE course data.
Success rates on AP STEM exams (Preparedness)	Most students intending to go on to university studies will take at least one AP test if it is offered in their school. Achieving a 3 indicates mastery of the subject area and several universities allow students to earn credit or place out of basic requirements if they score higher than that.	% of students scoring 3 or better on AP STEM tests	College Board reports.
Seniors and juniors meeting benchmark on ACT/SAT for math and science (Preparedness)	While the ACT/SAT have a selection bias toward those intending to pursue university studies, this indicator provides a sense of overall preparedness to be successful in post-secondary STEM disciplines. It may also provide a modest indication of the quality of K-12 education.	% student meeting benchmark compared with total participants	ACT/SAT aggregated state reports.

Proposed STEM Metric	Rationale	Definition	Possible Source
College credits earned in STEM subjects during high school (Interest/Attainment)	Participation in courses that earn college credit during high school has been shown to increase STEM career awareness and college-going rates.	average credit hours earned per student	HECC databases from community colleges and universities.
High school graduation rates (Attainment)	States with a well-educated work force are more likely to have higher levels of productivity and economic prosperity. Oregon's graduation rate is among the worst in the nation; a serious barrier to future talent development. Graduation rates will also be disaggregated by STEM-CTE concentrators (those who earn at least one credit in a state-approved STEM-related CTE program).	5-year graduation rate, plus GED attainment	ODE course data
Postsecondary enrollments in developmental mathematics (Preparedness)	Students who take non-credit bearing math courses in their first year of college are much less likely to continue in a STEM-related field. Students who begin a college career in remedial courses are also less likely to complete a college degree in any field. The need for remedial coursework in the first year of college has additional economic ramifications for students and their families, since remedial courses are typically non-credit bearing. This also provides a quality-related indicator as to the retention of mathematical content learned in K-12.	% of students enrolled in remedial mathematics courses in first year of college	HECC data
Community college STEM certificates, degrees, and industry-recognized credentials awarded (Attainment)	This indicator gives a sense of the supply of STEM-prepared students entering the workforce, or transferring on to further studies. This is a legislative requirement for the STEM Council under HB 2636 (2013).	Number and % of students earning STEM certificates, degrees, and industry-recognized credentials	Institutional reporting? STEM Hubs?

Proposed STEM Metric	Rationale	Definition	Possible Source
University STEM certificates and degrees (Attainment)	In an IES study of longitudinal data from 2003 – 2009, 48% of bachelor's degree students and 69% of associate's degree students between 2003 and 2009 who entered a STEM-related degree field left by the spring of 2009. Women and students of color are more highly represented in biological sciences, but in other STEM fields (especially computer science) there is less diversity and representation, thus providing a less welcoming environment where an individual can see others of his/her background succeeding. Reasons why students leave STEM degrees: uninviting atmosphere, difficult introductory sorting classes (in both math and science), STEM courses do not seem relevant. This is a legislative requirement for the STEM Council under HB 2636 (2013).	Number and % of students earning STEM degrees from public and private Oregon universities	HECC and IPEDs data
Full-time employment rates of post-secondary STEM completers within one year (Attainment)	One of the primary purposes of our STEM efforts is to ensure that supply of high-quality talent meets the demands of our STEM-related businesses and industries. In general, Oregon graduates must compete with out of state transfers for employment in STEM occupations. This indicator should provide some insights into the value of STEM credentials from Oregon post-secondary institutions.	% of Oregon completers (industry credential, 2-year, or 4-year degree) employed full time in Oregon within 12 months, adjusted for unemployment rate.	Employment department data. Cohort data provided by HECC.
Oregon completers participation in STEM workforce (Attainment)	One of the primary purposes of our STEM efforts is to ensure that supply of high-quality talent meets the demands of our STEM-related businesses and industries. In general, Oregon graduates must compete with out of state transfers for employment in STEM occupations. This indicator should provide some insights into the value of STEM credentials from Oregon post-secondary institutions.	% of Oregon completers employed in Oregon STEM occupations	Employment department data. Cohort data provided by HECC.
STEM business start ups (Attainment)	Oregon's STEM initiatives are intended to spur business innovations, not just fill jobs. New business start-ups in STEM fields should provide an indicator of the rate of innovation.	# new STEM-related business registrations annually compared over time	Oregon Corporation Division

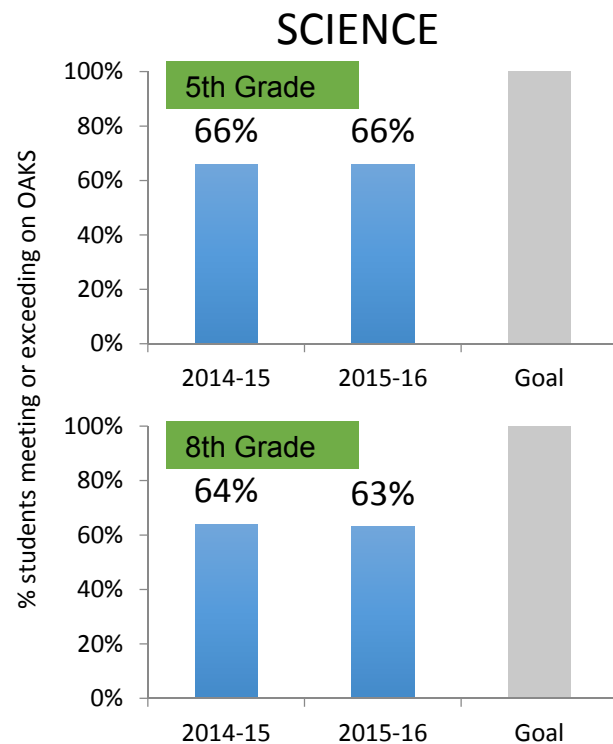
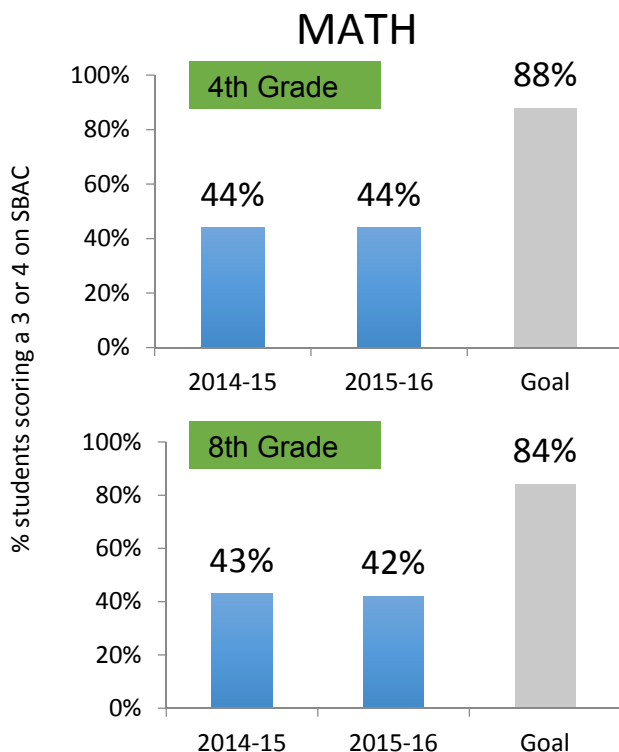
## APPENDIX C: BASELINE DATA

### Goal 1

**Double the percentage of students in 4th and 8th grade who are proficient in Math and Science.**

### Notes

In Math, the Smarter Balanced Assessment (SBAC) is administered at 4th and 8th grade. This assessment is aligned to Common Core State Standards with a score of 3 or 4 indicating students on-track for college. In Science, the OAKS is administered at 5th and 8th grades. This assessment is aligned to Oregon state standards that are in the process of conversion to the Next Generation Science Standards.

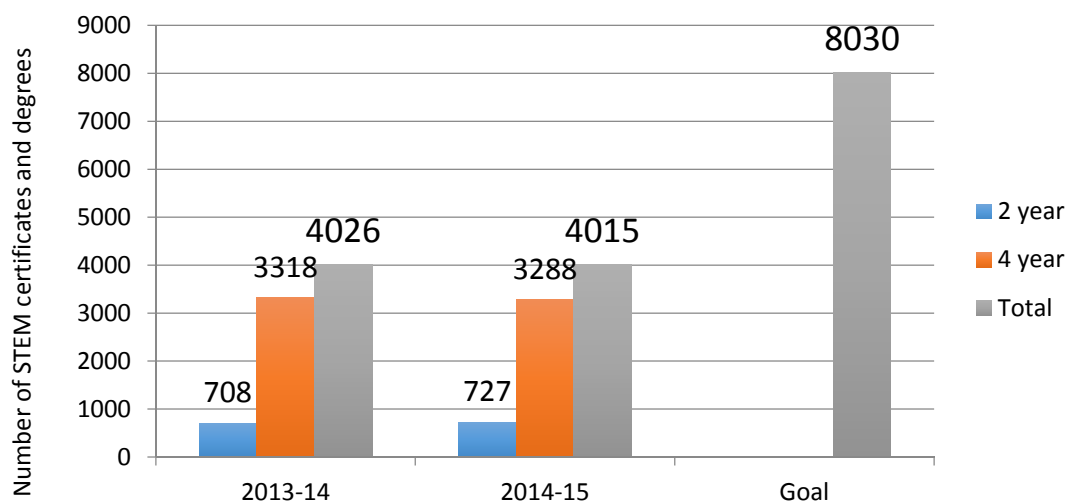


## Goal 2

**Double the number of students who earn a post-secondary degree requiring proficiency in science, technology, engineering or mathematics.**

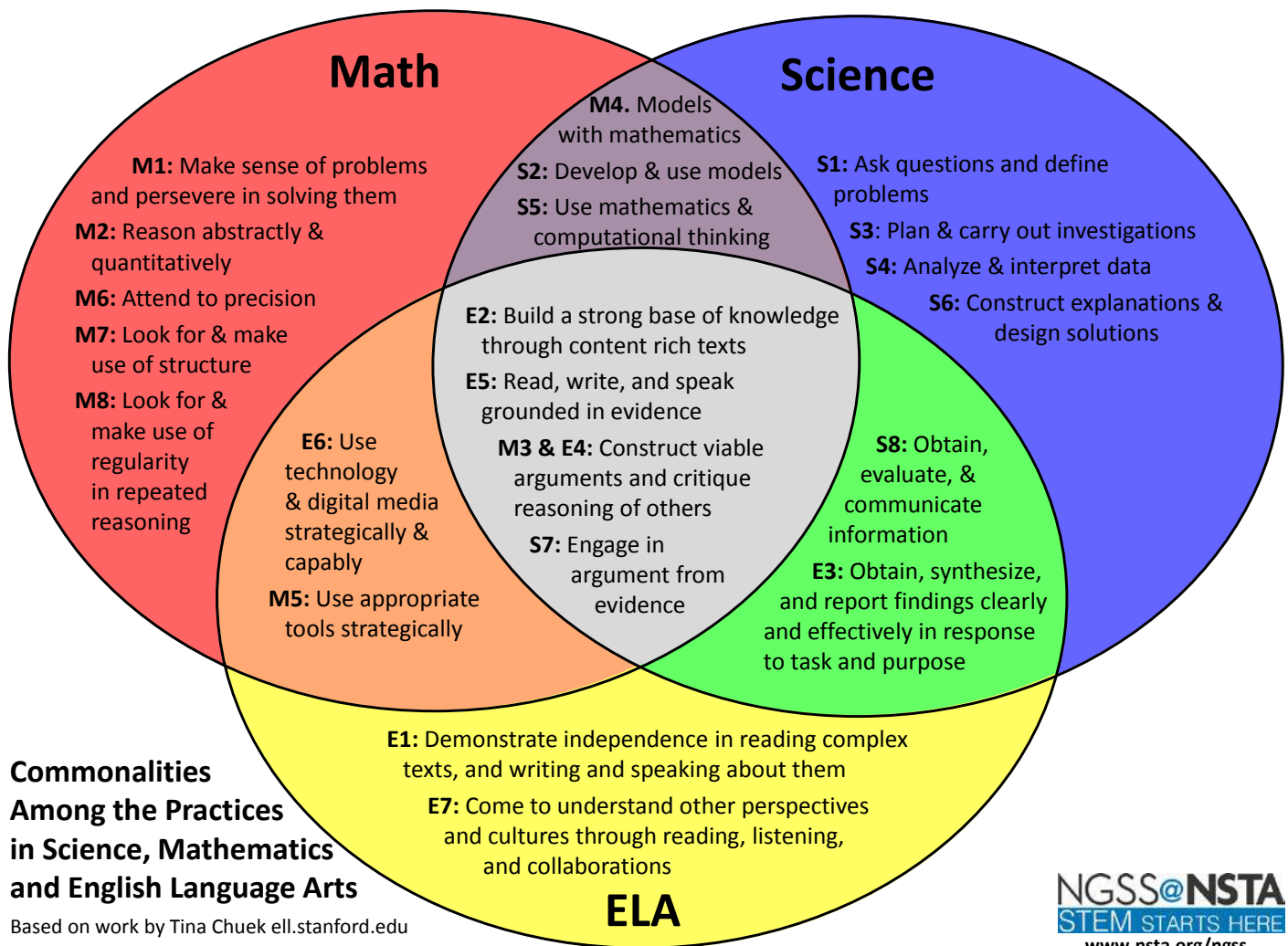
## Notes

Post-secondary STEM degrees were counted using methodology from the Brookings Institute (Rothwell, Jonathan and Kulkarni, Siddharth, Beyond College Rankings A Value-Added Approach to Assessing Two- and Four-Year Schools, pp. 26-28, Brookings, April 2015). Students are defined as those who ever attended an Oregon public K-12 school and then earned a 2- or 4-year certificate or degree in an Oregon public institution of higher education.

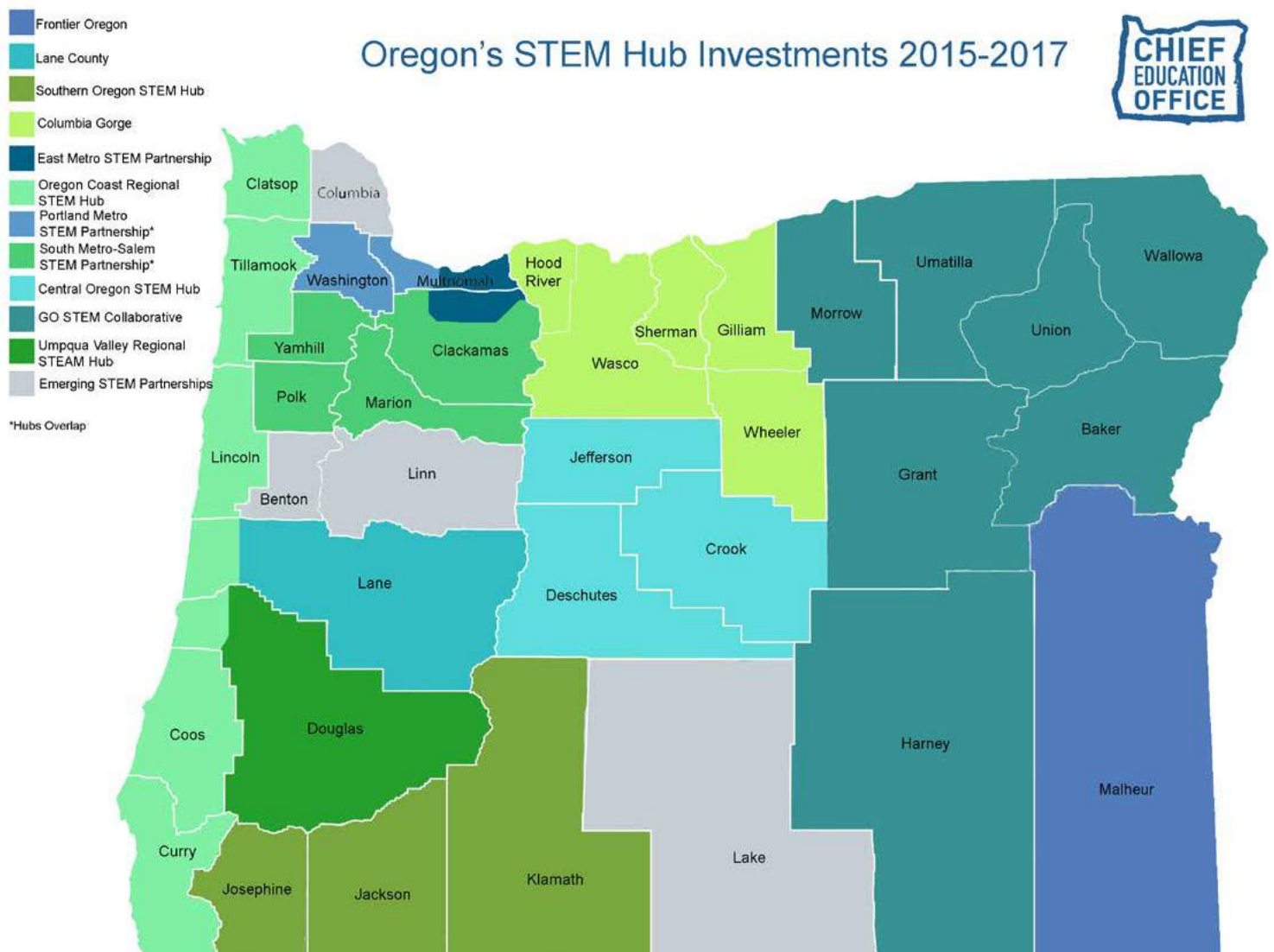




## APPENDIX D: COMMONALTIES IN THE PRACTICES ACROSS MATH, SCIENCE, AND LANGUAGE ARTS STANDARDS



## APPENDIX E: OREGON'S STEM HUBS 2015-17



## APPENDIX F: IMPLEMENTING THE PLAN — PROPOSED ACTIONS

*The following recommendations are summarized from several different regional community forums, focus groups with communities of color, input from Regional STEM Hub partners, leaders from K-12 school districts, and business partners. They represent specific suggestions for ways that constituents, agencies, and other stakeholders can support the operationalization of this plan. It should be noted that many of these recommendations are already in the process of being implemented by agencies, individuals, and partner initiatives.*

### K-12 Classroom Educators:

- Elementary school educators should increase the time on inquiry-based science instruction consistent with the NGSS, and integrating science with other subject areas whenever appropriate.
- Use project-based approaches to situate content within the context of “driving questions” arising from the real world.
- Value and reinforce sense-making, reasoning, curiosity, connections, and application over getting “the right answer.”
- Reduce the consequences of “failing” and build in opportunities for students to “iterate” and improve their understanding.
- Eliminate or reduce timed testing in mathematics, even for fluency of math facts. Place emphasis on applied, contextual math, and multiple strategies for problem-solving.
- Visit local STEM businesses and organizations to understand STEM careers and how content is applied in authentic settings.
- Prioritize questions and sense-making over getting to “the answer.”
- Encourage connections to other discipline areas as much as possible.
- Take learning into the community and bring the community into the classroom through local examples, issues, and volunteers.

- Foster individual student talent and curiosity. Find out what “lights them up.”
- Partner with volunteers who are STEM employees both in and out of the classroom.
- Invite diverse role models into your classroom.
- Avoid perpetuating STEM stereotypes and negative feelings, especially about math.
- Collaborate with peers from other subject areas and/or grade levels.
- Feed your own curiosity and remain playful.

### K-12 Administrators:

- Prioritize STEM skills and dispositions as fundamental skills and not just “add on” or “enrichment.”
- Ensure 3-4 hours of inquiry-based science per week in ALL elementary classrooms year round, integrating with other subject areas wherever possible.
- Partner with community-based after school and summer STEM programs, and allow them to use district facilities.
- Create school and district cultures that support risk-taking and (sometimes messy) applied learning approaches.
- Encourage more teachers to partner with STEM professionals and incorporate this into their professional development.

- Engage in regional collaborations, such as STEM Hubs or Regional Achievement Collaboratives, with other community leaders.
- Ensure students of color, students in poverty, and girls have equitable participation in STEM-related activities and programs.
- Expose students, teachers, counselors, principals, and other faculty to local STEM businesses and organizations.
- Reach out to parents, explaining to them how STEM-related careers could be a benefit to their kids.
- Prioritize CTE programs that are aligned to high-wage, high-demand areas such as biomedical sciences, manufacturing and engineering, and computer science.
- Engage with local and regional policy makers and encourage them to visit your STEM and CTE programs.

### **Post-secondary Faculty:**

- Increase mentoring, internships, and undergraduate research opportunities in STEM for students of color, women, and students in poverty.
- Incorporate experiential learning, collaboration, and “flipped” classroom approaches.
- Foster a culture based on student success, not “weeding out.”
- Ensure content is situated within rich contexts and arises from fundamental questions and phenomena.
- Provide opportunities to experience STEM in industry and research, within educator prep programs.

- Work more closely with K-12 to design and implement quality practicums that provide teacher candidates with opportunities to learn from exceptional STEM educators.

### **Out of school STEM program providers:**

- Increase marketing and program outreach to communities and students of color.
- Continue to focus on experiential and playful learning that fosters curiosity, creativity, problem-solving, critical thinking, and develops positive STEM identities.
- Incorporate STEM content and practices consistent with the Common Core Math and Next Generation Science Standards.
- Collaborate with schools and formal educators to reinforce learning in and out of school.
- Implement the State’s “common measures” STEM instruments to assess impact on participants.
- Contribute event information to a statewide database of community-based STEM programs.
- Cooperate with statewide data collection and assessment efforts.
- Utilize the Youth Program Quality Assessment or other research-based instrument to guide continual improvement.
- Connect program activities to potential career exploration.

### Policy Makers and elected officials:

- Dedicate adequate and sustainable funding for transforming STEM and CTE educational outcomes. Provide sufficient time for initiatives to have impact.
- Elevate the importance of quality science learning and instruction alongside reading, mathematics, and CTE.
- Provide ongoing funding for afterschool STEM programs and intermediary organizations, especially for those students historically underserved and underrepresented in STEM fields.
- Provide financial incentives for more STEM teachers of color, career-changers, and those working in hard to fill regions.
- Ensure broader representation of diverse stakeholders in decision-making.
- Continue to provide scholarships for post-secondary studies, especially targeting high-wage, high-demand STEM fields.

### Business and Industry:

- Incentivize (pay) STEM employees—especially those of color—to volunteer with education programs both in, and out of, school.
- Join other business leaders to advocate for increased legislative, county, and city support for STEM and CTE programs.
- Partner with local schools to provide student (paid) and teacher internships, job shadows, and tours within STEM and CTE companies.
- Participate in Regional STEM Hub efforts to transform education and meet workforce needs.

- Invest in both local and statewide STEM programs.
- Prioritize diversity in recruiting and hiring diverse STEM employees, and in selecting interns.
- Partner with the State Chamber of Commerce to develop promotional materials, showcasing opportunities for Oregon's innovation economy.

### State Agencies

#### All/Other:

- Modernize Oregon's Career Information System to be more accessible to students and parents, with real-time market data on jobs and salaries.
- Address unique issues in rural communities related to funding, professional learning structures, educator workforce incentives, etc.
- Ensure representation of diverse stakeholders during STEM and CTE policy-making discussions.
- Increase recruitment and promotion of the STEM and CTE teaching profession.

#### Chief Education Office:

- Continue to work with communities of color and communities in poverty to champion issues around equity of access and opportunity.
- Work to bring greater coherency across multiple regional initiatives and various state districting boundaries.
- Work with the Department of Education to create a repository of STEM educational resources and curricula.
- Support the development of a one-stop website for parents and students about regional afterschool STEM programs and events.
- Advocate for support of out-of-school STEM

programs and increase capacity of provider networks and intermediaries.

- Work with ODE to advocate for extensive professional development and pre-service funding, especially in mathematics.

### Early Learning:

- Provide professional development for early child-care providers emphasizing playful inquiry
- Promote multi-sensory, interactive learning environments, and discourage the use of worksheets or other methods that are focused on simple recall of math/science facts.
- Parental outreach and messaging regarding the importance of play and interactive experiences — particularly unstructured, outside nature play.

### Department of Education:

- Work with the State Board of Education to recommend increased time on inquiry-based science of at least 3-4 hours per week in elementary school. Encourage elementary educators to integrate math and language arts with those science experiences.
- Include science assessments as part of the State's ESSA plan.
- Include afterschool STEM programming as part of Oregon's state plan for the Federal Every Student Succeeds Act.
- Use Code.org or other national framework to rapidly develop statewide computer science standards and have them adopted by the State Board by 2018. These should be part of a more comprehensive digital literacy plan, but should not be delayed

while that broader plan is being developed.

- Create CTE Programs of Study frameworks that are pre-designed for customization at the local level and that are aligned to local, regional, and state high-wage, high-demand careers. Recommended state priorities include: 1) biomedical and health sciences, 2) computer science, 3) manufacturing, mechatronics, and engineering, 4) and precision agriculture.
- Work with Regional CTE Coordinators, CCWD, and community college CTE faculty to increase alignment and articulation of K-12 Programs of Study with community college CTE pathways.
- Streamline grants processes to reduce administrative burden on grantees and applicants and move more toward "outcomes-based" funding for STEM Hubs.
- Provide parent "briefs" on how to support their student in math and science.
- Work with COSA (administrators) and OSBA (school boards) to prioritize focus on applied learning in STEM and CTE.
- Communicate opportunities for districts to support quality STEM and CTE professional development and education using ESSA funding.
- Work with Regional STEM Hubs and ESDs to provide quality professional development for K-12 teachers and principals consistent with Math and Science standards and emphasizing applied learning connected to careers.
- Integrate STEM and CTE priorities into other statewide plans for educational improvement such as ESSA plan and increasing graduation rates.



### Higher Education Coordinating Commission:

- Establish outcomes-based funding incentives with community colleges for students attaining credentials in high-wage, high-growth STEM and CTE programs, with additional incentive for students of color and first-generation college-goers.
- Increase the incentives within the university funding formula to encourage more programs aligned to high-wage, high-growth fields, as well as for underserved and underrepresented students attaining degrees in those fields.
- Continue to work with institutions to improve cross-institution consistency and effectiveness of math placement.
- Implement recommended changes in math developmental education courses to increase student success and appreciation of math.
- Redesign cross-institutional math course sequencing geared toward applied program needs.
- Work with ODE and educator preparation programs to increase focus on applied learning/teaching in math and science.
- Equity – continue to increase the availability of effective support programs for students of color and first-gen college goers.
- Work with ODE, Regional CTE Coordinators, and community college CTE leaders to increase alignment and articulation of K-12 Programs of Study with community college CTE pathways.
- Work with institutions and industry to increase undergraduate research opportunities and internships.

- Endorse and use the Brookings definition of STEM degrees and certificates.
- Adopt common course numbering and reciprocity in crediting across state institutions with particular emphasis on consistency in transferring from community college to university.
- Work with institutions to increase diversity in hiring STEM faculty.

### Teacher Standards and Practices Commission:

- Develop a report analyzing STEM and CTE teacher supply and demand, anticipating retirements and regional shortages in Oregon's STEM and CTE educator workforce.
- Streamline licenser requirements for those with significant content experience in STEM and CTE industries.
- Increase recruitment and promotion of the STEM and CTE teaching profession.

## CITATIONS

- 1 2015-2017 Oregon Talent Plan:  
[https://www.oregon.gov/EMPLOY/OTC/Documents/OTC\\_TalentPlanAdopted\\_11-12-2015.pdf](https://www.oregon.gov/EMPLOY/OTC/Documents/OTC_TalentPlanAdopted_11-12-2015.pdf)
- 2 Oregon Economic Review and Forecast, September 8, 2015; accessed December 2, 2015:  
<http://www.oregon.gov/DAS/OEA/docs/economic/oregon.pdf>
- 3 Ibid.
- 4 U.S. Department of Education,  
The Nation's Report Card (2015), accessed on November 24, 2015,  
<http://nces.ed.gov/nationsreportcard/subject/publications/stt2015/pdf/2016009OR4.pdf>.
- 5 Oregon STEM Employer Coalition, *Oregon Learns: Time to Invest Seriously in STEM* (2012)
- 6 Ibid.
- 7 Oregon Economic Review and Forecast, September 8, 2015; accessed December 2, 2015:  
<http://www.oregon.gov/DAS/OEA/docs/economic/oregon.pdf>
- 8 Note that most of these are reflected in Oregon's 'Essential Skills' as well as the College and Career Readiness  
Standards: <http://education.oregon.gov/wp-content/uploads/2015/09/Adopted-College-and-Career-Readiness-Definition.pdf>
- 9 2016 Oregon Educator Equity Report:  
<http://education.oregon.gov/portfolio/2016-educator-equity-report/>
- 10 Change the Equation, Vital Signs;  
<http://vitalsigns.changetheequation.org/state/oregon/curriculum>
- 11 TIES STEM Education Monograph Series: Attributes of STEM Education; Aug 2006;
- 12 LASER i3 Validation Study by the Center for Research in Educational Policy (CREP) at the University of  
Memphis; 2015
- 13 Duncan, et al. "School Readiness and Later Achievement," 2007;  
<http://eprints.ioe.ac.uk/5971/1/Duckworth2007SchoolReadiness1428.pdf?origin=public>
- 14 What Is the Impact of Decline in Science Instructional Time in Elementary School? 2012;  
<http://www.csss-science.org/downloads/NAEPElemScienceData.pdf>
- 15 Generation STEM: What Girls Say About Science, Technology, Engineering and Math; 2012;  
[https://www.girlscouts.org/research/pdf/generation\\_stem\\_full\\_report.pdf](https://www.girlscouts.org/research/pdf/generation_stem_full_report.pdf)

- 16 Oregon Computer Science Teachers Association, 2012
- 17 Code.org, state-facts, OR, 2015: <https://code.org/advocacy/state-facts/OR.pdf>
- 18 Philip Bell, Bruce Lewenstein, Andrew W. Shouse, and Michael A. Feder, Editors; Learning Science in Informal Environments: People, Places, and Pursuits (2009), National Research Council
- 19 National Governors Association, The Role of Informal Science in the State Education Agenda, <http://www.nga.org/files/live/sites/NGA/files/pdf/1203INFORMALSCIENCEBRIEF.PDF>.
- 20 Ibid.
- 21 National Science Foundation, Women, Minorities, and Persons with Disabilities in Science and Engineering (2009)
- 22 Bryant, James A. Jr. (2010). "Dismantling Rural Stereotypes." Educational Leadership, November 2010, Vol 68, No 3, pp. 54-58
- 23 National Alliance for Partnerships in Equity: <http://www.napequity.org/resources/role-models/>
- 24 Rivkin, S.G., Hanushek, E.A., and Kain, J.F. "Teachers, Schools and Academic Achievement," Econometrica, Vol. 73, No. 2 (March 2005)
- 25 Nurturing Quality Teachers in Oregon, A Profile of Success and Challenges of Six Oregon Districts; ECONorthwest, 2008
- 26 Education First: Common Core State Standards & the Transformation of Professional Development; [http://www.education-first.com/files/CCSS\\_PD\\_Brief\\_1\\_-\\_Essential\\_Elements\\_of\\_PD.pdf](http://www.education-first.com/files/CCSS_PD_Brief_1_-_Essential_Elements_of_PD.pdf)
- 27 2014 TELL Oregon Survey, Spring 2014
- 28 Oregon Coast Regional STEM Hub, *Oregon Coast Regional STEM Hub Partnership Plan*, 2014
- 29 Rothwell, Jonathan, The Hidden STEM Economy, pp. 23-25, Brookings, June 2013
- 30 Rothwell, Jonathan and Kulkarni, Siddharth, Beyond College Rankings A Value-Added Approach to Assessing Two- and Four-Year Schools, pp. 26-28, Brookings, April 2015







[Home](#) > [News](#) > [Announcements](#) > [Announcement Details](#)

3/17/2014 8:38:00 AM

## STEM, STEAM and/or CTE Program and Activity Grant -- Awardees

Congratulations to the recipients of the STEM, STEAM and/or CTE Program & Activity Grant! We were very pleased by the level of enthusiasm as well as the thoughtful and innovative approaches that we received. The grant review team evaluated a total of 87 grant proposals. We want to thank everyone involved with supporting applicants who submitted proposals to increase student learning outcomes in STEM, STEAM and CTE education. We are excited to announce grant awards to:

Join us in congratulating the following Awardees:

- [Bethel School District](#) [PDF](#)  
\$102,514
- [Canby School District](#) [PDF](#)  
\$128,010
- [Foundation for Science and Engineering](#) [PDF](#)  
\$68,198
- [Girls Inc.](#) [PDF](#)  
\$86,384
- [Harney County Schools](#) [PDF](#)  
\$140,274
- [Jefferson County Schools](#) [PDF](#)  
\$181,245
- [John Day School District](#) [PDF](#)  
\$199,878
- [Lane Foundation](#) [PDF](#)  
\$225,000
- [Neah-Kah-Nie School District](#) [PDF](#)  
\$144,717
- [Oregon Health & Science University](#) [PDF](#)  
\$137,929
- [Portland Community College](#) [PDF](#)  
\$112,000
- [Portland Public Schools](#) [PDF](#)  
\$220,000
- [Saturday Academy](#) [PDF](#)  
\$68,500
- [SMILE](#) [PDF](#)  
\$108,019
- [Treasure Valley Community College](#) [PDF](#)  
\$200,000




**• Woodburn School District PDF**

\$172,580

- end -

**Contact(s) for this Announcement**

- **Jamie Rumage**  (503) 947-6504  
Standards and Instructional Support - Education Program Specialist

## Contact Us

Oregon Department of Education  
<http://www.Oregon.gov/ode>  
[ode.frontdesk@ode.state.or.us](mailto:ode.frontdesk@ode.state.or.us)  
Voice: 503-947-5600  
Fax: 503-378-5156  
255 Capitol Street NE  
Salem, OR 97310-0203  
USA

## Helpful Resources

**ODE Accessibility Statement**  
**Career Opportunities**  
**Educator Effectiveness**  
**School Report Cards**  
**State Board**  
**Site Map**

## About Oregon

**Oregon.gov**  
**State Directories**  
**Agencies Listing**  
**Accessibility**  
**Privacy Policy**  
**Supported Browsers**



Select Language ▼

Powered by  **Translate**

Copyright © 1998-2017 Oregon Department of Education

# Tax abatements in Hillsboro, Washington County take a toll on school districts statewide



Hillsboro Mayor Jerry Willey and Washington County Chair Andy Duyck present Hillsboro School District with a Gain Share check. That funding is counted outside the state's school funding model. (Luke Hammill/The Oregonian)



By **Katherine Driessen | The Oregonian/OregonLive**

[Email the author](#) | [Follow on Twitter](#)

on January 21, 2014 at 5:57 PM, updated January 22, 2014 at 8:38 AM

School districts statewide inadvertently absorb the **multimillion-dollar tax breaks** that Hillsboro and Washington County have extended to Intel for almost two decades.

To date, Intel has saved about \$766 million in property taxes at its Hillsboro and Aloha campuses, courtesy of a series of agreements with the county and city. About 40 percent of local property taxes typically go to schools, meaning \$306 million, in Intel's case, in foregone school funding. Of that total, about 80 percent would have gone to the schools' operating costs.

But Hillsboro and Washington County schools haven't lost a dime to the tax break because all of Intel's unpaid school taxes were made up by state taxpayers at the expense of every school district in the state.

## TAX BREAKS AND SCHOOLS

All Oregon public schools students receive roughly the same dollar amount, based on weighted factors (such as the size of their school, or if English is a second language). The principle is this: No student in Oregon ever goes underfunded simply because their district lacks the property taxes. The state uses mostly income taxes to backfill what local jurisdictions can't afford.

Only a handful of school districts with just the right balance of population and property tax base can completely cover their costs -- the per-student weighting multiplied by the number of students. The larger the gap between a district's property taxes and its student costs, the more reliant it is on state school funding. The fewer state school funds, the smaller the overall pot.

That's why Hillsboro and Washington County's Intel tax breaks become every district's loss.

According to an Oregonian analysis of Oregon Department of Education data, Hillsboro School District covered 36 percent of its costs with local property taxes in the 2011- 2012 school year; Tigard-Tualatin School District 49 percent; Portland Public School District 55 percent. Eugene School District, comparable in student population to Hillsboro, pulled 48 percent of its school funding weight with property tax dollars.

Had Intel paid its waived property taxes in 2011-12, Hillsboro School District would have covered about 48 percent of its costs. To fill that Intel gap, the state school fund, in essence, shifted more of the school fund to Hillsboro, siphoning off money that would have gone to every school district in the state.

Conversely, if Hillsboro were to collect more property taxes by limiting its abatements, other districts would gain, according to the state school fund manager, Michael Elliott.

"More income taxes go to the rest of the state, more property taxes to that school district," Elliott said.

## The SIP

When Hillsboro and Washington County signed their first tax break agreement with Intel in 1994, the deal was meant to keep the company from leaving the state and to secure what would become a multibillion-dollar investment. The agreement, called a **Strategic Investment Program**, was signed into law in 1993 at Intel's urging.

In urban areas, a company with a SIP deal pays regular property taxes on the first \$100 million of investment – in this case, highly technical equipment. After that, the company does not have to pay taxes on costly equipment but does pay a set community fee.

The SIP's introduction came shortly after a statewide shift to the equalization model for schools.

At the time, there wasn't much conversation about how the new school funding system and the property tax breaks might overlap, said Paul Warner, Oregon's top legislative revenue officer. Few people anticipated the SIP having a long life or extending beyond Intel. The investment threshold is high for the program and the property tax breaks can run in the millions.

"The idea then was that this was a one-off thing for Intel," Warner said.

But as Intel expanded in Washington County, proving an economic stronghold, the chip-maker sought three more SIP agreements. This year, the company is expected to start negotiating for another round.

Certainly, Intel isn't the only Oregon company taking advantage of tax breaks. Genentech, also located in Hillsboro, recently signed onto a SIP agreement, saving the company about \$9 million in property taxes. Wind farms in Union, Sherman and Umatilla counties also partake in SIP deals. SIP is among the largest tax-incentive programs in the state, used to lure major companies to

[Hillsboro School District to receive \\$1.9 million in Gain Share funds this year](#)

[Washington County and Hillsboro to allocate an extra \\$3 million Gain Share funds to schools](#)

[Live chat Wednesday: Why Washington County, Hillsboro's tax breaks hit school districts statewide](#)

[Tax abatements in Hillsboro, Washington County take a toll on school districts statewide](#)

[Gain Share school donations not local revenue, shouldn't reduce state aid, Oregon Department of Education says](#)

## All Stories

Oregon and encourage them to expand locally.

Brian Reeder, ODE's Assistant Superintendent of Analysis and Reporting, said calculating the cost-benefit of tax breaks is a difficult task, often yielding "conflicting results" based on who is doing the analysis and under what parameters.

Intel credits the first round of tax breaks with keeping it in Oregon and others for allowing it to expand. SIP agreements since have drawn increasing community questions about whether they are necessary. Local officials, though, say the company's economic heft outweighs its tax breaks.

Intel commissioned an ECONorthwest study of its economic impact this year, which said the company created a \$26.7 billion economic impact and generated almost \$90 million in personal income taxes. The study uses "upperbound data," some of the numbers may be overstated. The company paid \$20.8 million in direct property taxes in 2012, according to the report.

"They're obviously major contributors to the personal income tax," Warner said. "There's no question that Intel's workforce is very highly paid relative to the rest of the state."

Intel also pays into a community fund as part of its tax agreement. That has put approximately \$32.8 million back into Washington County schools and programs as part of Intel's community service fee payments, with special consideration given to Hillsboro School District.

But none of that money was factored into the state equalization formula, so more income taxes were shifted to Hillsboro schools at the same time it was spending the community fund money. The community fund still exists, but schools no longer benefit from it.

### **Gain share trigger**

The newest pot of money that is factoring into school-funding debates is an income tax-sharing program under legislative scrutiny. Called Gain Share, the program gives back to local jurisdictions some income taxes that SIP abatements help generate. Its proved more costly than the Legislature expected.

Washington County pushed for the program in 2007 and has proved the largest beneficiary, netting more than \$20 million in Gain Share's first two years. The city and county each expect more than \$80 million during the next five years.

When Rep. Ben Unger, D-Hillsboro pushed to send a legislated amount of Gain Share dollars to Washington County schools last session, education funding entered the picture.

The county and city bristled at the idea of making millions in discretionary funds not-so-discretionary. Ultimately, Hillsboro Mayor Jerry Willey and Washington County Chair Andy Duyck pledged \$10 million in Gain Share funds to local schools, so long as the Legislature leaves the contentious and expensive program untouched.

Hillsboro schools received \$1.2 million in Gain Share money, which also was exempt from the state equalization formula. Again, it was just extra money.

Shortly after large, lottery-size Gain Share checks were delivered to Washington County school districts last fall, a Roseburg legislator brought the issue full circle with a loaded question: Shouldn't Gain Share dollars count as local revenue for Washington County school districts?

Under state law, funds that are considered "in lieu" of property taxes are counted as property taxes. Those dollars are then rolled into a district's local revenue, decreasing the state funding a district requires.

"In my opinion, it should be counted," Rep. Tim Freeman, R-Roseburg, said of Gain Share dollars. "If it's not, it creates this weird dynamic."

Freeman's question drew sharp rebuttals from Washington County officials and ultimately the ODE said the dollars were exempt from the school funding formula.

But his question scratched the surface of a larger issue: Washington County schools reap substantial benefits from Intel that don't go toward their school fund payments. So, even as other schools around the state are receiving less funding overall because of Intel's tax breaks, Washington County schools are getting additional perks.

The \$10 million in Gain Share funds won't put a dent in Washington County schools' state funding. Nor did the \$32.8 million Intel sent to Washington County k-12 schools and programs through its community service fee agreement.

Intel also donates millions in volunteer hours and other help to Washington County schools, primarily the Hillsboro School District. The value of the Intel donations also are not counted toward school equalization funding.

When Beaverton School District and Hillsboro School District both went to voters for funds last year, Intel made substantial campaign donations.

Freeman's question, coupled with growing unease among some legislators about Gain Share, are spurring discussion about the value and cost of SIPs.

"The environment here at the state level has filtered to the local level that incentives need to be evaluated closely," Warner said. "Not to say that they're bad, but there needs to be a review."

#### A fix?

Unger, the Hillsboro state representative, says one way to remedy the school funding problem is to exempt school districts from programs like the SIP, urban renewal district and vertical housing zones. Under a bill [Unger is hoping to at least float in February](#), school district property tax dollars wouldn't be on the table when negotiating tax breaks.

In effect, that would limit how much counties and cities could offer in tax breaks. Considering the value many officials attach to programs like SIP, that may not prove popular.

It's a lofty bill and Unger said he knows it's going to take quite a bit of convincing and, perhaps more pressing, explaining.

School funding and tax breaks tend to be looked at narrowly. Part of Unger's approach will be to give tax breaks a more "global" context, he said.

It won't be an easy sell. Most people, he said, don't understand the statewide impact of one district's tax breaks. He's calculated that about \$378 million could be restored to schools under his plan.

"We're still in a lot of ways addicted to tax breaks," Unger said "We want to keep proving that they're job creators."

- Katherine Driessen

Registration on or use of this site constitutes acceptance of our [User Agreement](#) and [Privacy Policy](#)

© 2017 Oregon Live LLC. All rights reserved ([About Us](#)).

The material on this site may not be reproduced, distributed, transmitted, cached or otherwise used, except with the prior written permission of Oregon Live LLC.

**Community Rules** apply to all content you upload or otherwise submit to this site.

[▶ Ad Choices](#)

# Calagator

Events Venues

Browse events

Add an event

Import events

» [Export or edit this event...](#)

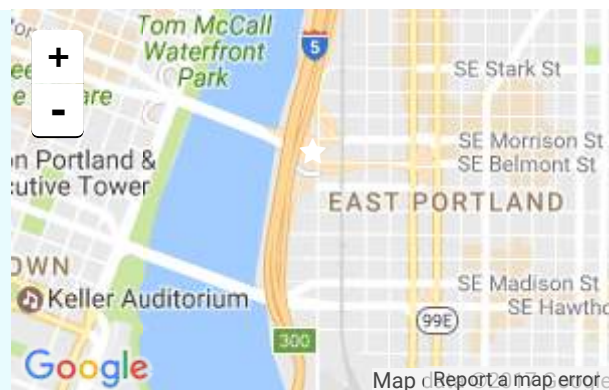
## Tech Community Open House: PDC's 2015-2020 Strategic Plan

Tuesday, March 3, 2015 from 5:30 –7pm

### Uncorked Studios

1001 SE Water Ave #350

Portland, OREGON 97214, United States ([map](#))



### Website

<http://www.eventbrite.com/e/tech-community-open-house-pdcs-2015-2020-strategic-plan-tickets-15916022251>

### Description

The Portland Development Commission (PDC) is in the process of updating its Strategic Plan to set the agency's course of action over the next five years and we'd like your input. Come learn about how this plan addresses Portland's economic future as it relates to the tech, design, and startup community.

Join us for an open house to discuss the 50% Draft PDC Strategic Plan with PDC staff and the tech, design, & startup community.

### Share



### Tags

[community](#), [economic development](#), [startups](#), [tech](#)

calagatororg 1.0.0.rc3



# PRESIDENT OBAMA INCLUDES CODE OREGON IN TECHHIRE INITIATIVE

MARCH 9TH, 2015

President Obama announced today the launch of TechHire, a bold public-private initiative with over 300 employer partners aimed at helping more Americans train and connect to IT jobs in fields such as software development, network administration and cybersecurity. Worksystems' **Code Oregon** is one of 20 successful technology training programs that was highlighted by the President as he challenges more communities to follow our lead.

## *Code Oregon featured on KGW News!*

**Code Oregon** is an innovative, free, online training program dedicated to teaching 10,000 Oregonians how to code and prepare them for high paying, in-demand careers in software development, front and back-end web development, and app design. Since Code Oregon's "soft launch," 5,256 people in the Portland area have signed up to participate in training with just over 2,200 having earned at least one badge.

Training graduates are connected to local technology jobs through WorkSource, the public workforce system and member of America's Job Center Network. We are actively working with employer partners including Square Space, Metal Toad, and Portland General Electric to fill the 2,400 technology job openings that are available in the Portland Metro region today.

As part of the TechHire initiative, Worksystems is committing to offer 100 on-the-job training opportunities and 50 paid internships to provide work experience and promote hiring of Code Oregon graduates. In addition, we are partnering with JP Morgan Chase to recruit tech mentors to offer additional support to underserved communities, cross-walking community college and university curriculum with on-line badges, and providing transferrable college credit to 60 students who complete the accelerated Code Oregon pathway model.

### **Background on Code Oregon**

By 2020, there will be one million more computer programming jobs in the U.S. than workers to fill them, and 10,000 of those jobs will be in the Portland metro region. To close the skills gap and prepare area residents for careers in technology, Worksystems, the local Workforce Development Board, has teamed up with online training provider Treehouse to build the region's future IT workforce through Code Oregon.

Online courses are offered for free through funding from Worksystems and the State of Oregon with a focus on connecting underserved/underrepresented populations such as communities of color, women, older workers and Veterans to training. Our goal is to build a diverse, inclusive technology talent pipeline that supports Oregon's growing software sector and establishes Oregon as a leader in software talent.

**Related files:**

 [White House Fact Sheet on TechHire.docx](#)



the WHITE HOUSE PRESIDENT BARACK OBAMA

# TechHire Initiative

[JUMP TO A SECTION](#)

(JAVASCRIPT//)

*"When these tech jobs go unfilled, it's a missed opportunity for the workers, but it's also a missed opportunity for your city, your community, your county, your state, and our nation"*

*- President Barack Obama, National League of Cities Annual Conference March 9th, 2015*

## Administration continuing to expand TechHire

On March 10, 2015, President Obama announced his TechHire initiative, a new campaign to expand local tech sectors by building tech talent pipelines in communities across the country. That announcement included three main components: (1) More than 20 communities with over 300 employer partners signed on to pilot accelerated training strategies; (2) large private-sector companies and national organizations committed to providing tools to support these TechHire communities; and (3) the President pledged \$100 million in federal grant funding.

Today, the number of TechHire communities has more than doubled, to 50. If your community is interested to join the TechHire movement, please scroll down for more information on the TechHire initiative and how to get involved.

## \$150M awarded in Department of Labor TechHire Partnership Grants

Consistent with the goals of TechHire, today, Vice President Biden and Department of Labor Secretary Perez are announcing the release of \$150 million in new Department of Labor TechHire grants—which will support 39 public-private partnerships to help train tomorrow's workforce in rapid-growth sectors like tech, healthcare, and advanced manufacturing.

The grants will focus on providing workers the skills for a pathway to the middle class while providing employers with the skilled technology workers need to grow and expand. The Department of Labor estimates that more than 18,000 participants will receive services through the TechHire grant program. Over \$125 million of the grants will go to partnerships that specifically target, train, and support young people, ages 17-29. In addition, \$24 million will go to partnerships that help other disadvantaged groups with barriers to employment, including veterans, people with disabilities, people with limited English proficiency, and people with criminal records.

Grant winners and TechHire community partnerships focus on the following:

- Data and innovative hiring practices to expand openness to non-traditional hiring
- Models for training that prepare students in months, not years
- Active local leadership to connect people to jobs with hiring on ramp programs

The TechHire initiative launched in 2015 with 21 communities and over 300 employers committed to providing Americans with the accelerated, nontraditional technical training they need to obtain better jobs and achieve better futures. Since the launch of TechHire, the initiative has grown to 50 communities, committed to improving the lives of Americans. The President is challenging other communities across the country to follow their lead and get involved.

## Rural Tech in the U.S: South Central Appalachia TechHire

On June 27, 2016 the Administration also launched South Central Appalachia TechHire, a joint effort by the Appalachian Regional Commission, the University of Virginia's College at Wise, and private sector employers to develop a world-class ecosystem of tech talent in the heart of Appalachia. Together, South Central Appalachia TechHire will prepare and place over 50 individuals into tech jobs over the next year, and 400 by 2020.

To learn more about TechHire in rural communities, check out the blog post from NEC Director Jeff Zients and Secretary of Agriculture Tom Vilsack.

**WATCH AND READ ABOUT THE LAUNCH** ([/BLOG/2015/03/10/PRESIDENT-OBAMA-LAUNCHES-TECHHIRE](#))

**LEARN MORE ABOUT THE GRANTS** ([/THE-PRESS-OFFICE/2016/06/27/FACT-SHEET-EXPANDING-TECH-ECONOMIES-COMMUNITIES-ACROSS-COUNTRY](#))

**SPOTLIGHT ON RURAL TECH** ([/BLOG/2016/06/27/SEIZING-TECHHIRE-OPPORTUNITY-RURAL-AMERICA](#))

**You can support the President's TechHire initiative on social media using the hashtag #TechHire.**

### Join The TechHire Community

We would welcome the opportunity to work with you to highlight new, specific, and measurable steps that your community is ready to take in these areas. If applicable, your announcement may be incorporated into White House materials in the coming months and your organization and relevant partners may be invited to participate in upcoming White House events on this topic.

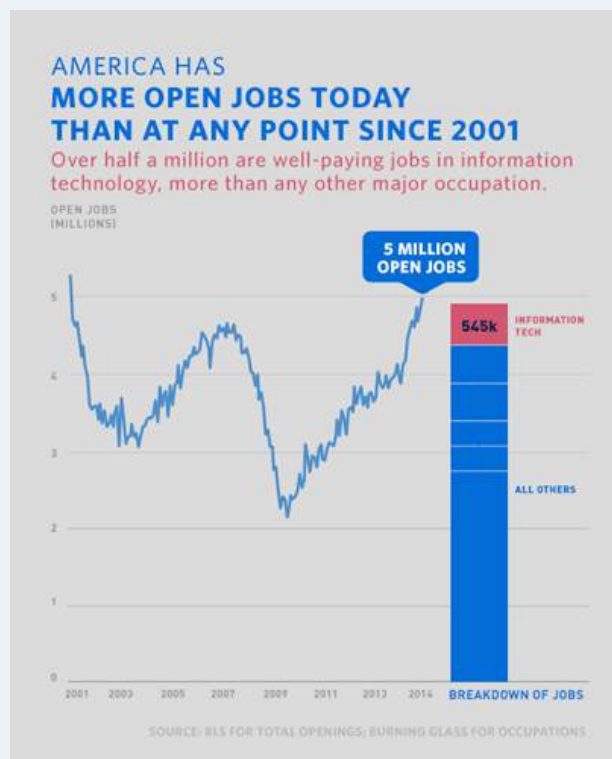
**Commit to become a TechHire Community or employer partner today!** As a first step, we request you fill out the information at the link below, which requires coming together with partners across your region to develop an action plan for



training and placing more people from your community into tech jobs. **Please submit the form at the link below by August 31, 2016 for the next round of consideration.**

**I WANT TO MAKE A COMMUNITY COMMITMENT** (/WEBFORM/PRESIDENTS-CALL-GET-MORE-AMERICANS-TECH-JOBS-FUTURE)

**I WANT TO MAKE AN EMPLOYER COMMITMENT** (/WEBFORM/PRESIDENT-S-CALL-EMPLOYERS-GET-MORE-AMERICANS-TECH-JOBS-FUTURE)



Today there are over half a million unfilled jobs in information technology across all sectors of the economy. These IT jobs make up ~12% of the approximately 5 million job openings making IT the largest occupational category for open jobs right now. Non-IT industries currently employ two-thirds of these private sector IT workers. **IT jobs in fields like cybersecurity, network administration, coding, project management, UI design and data analytics offer pathways to middle-class careers with average salaries more than one and a half times higher than the average private-sector American job.** IT and cybersecurity jobs are not only for people with advanced degrees

In fact, hundreds of thousands of these jobs require skills that can be learned not only in universities, but also in community colleges, in industry-certified training programs, in “coding boot camps” or in high-quality online courses.

And they’re not just in Silicon Valley, or in the high tech industry – many are in industries we don’t think of as part of the technology sector – in health care, retail, manufacturing, financial services, energy, transportation, or in local government. Helping more Americans train and connect to these jobs is a key element of the President’s middle-class economics agenda.



## Meeting Employer Demand

Employer demand for IT skills is everywhere-- and it is growing. Those ready to hire from both nontraditional and traditional training programs are reviewing and upgrading their hiring practices to integrate non-traditional hiring. Employers are also working to share robust data on where they have greatest needs and what skills they are seeking to help make sure that training leads to jobs.

Explore the map below to find open IT jobs near you.



## Innovative Training that Works

In addition to strong four-year and two-year degree programs, new models have emerged for interested non-tech-experienced students to gain coding skills in months, not years. These new training programs can be run both independently or as part of a local community college or university education offering.



## Community Leadership

Strong local leadership convenes and fosters communication, collaboration and innovation amongst local players. Mayors, council members, workforce development program offices and other local leaders can bring together employers, training providers and other key local players and commit to support the TechHire initiative.

Explore the map below for communities that are already leading.



## Regional Teammates

Most cities have a broad spectrum of local leaders who can bring their resources and expertise to this effort. As an example, local tech community leaders can welcome new students to their tech meet-ups, startup weekends, developer hack-a-thons, campus tech and entrepreneurship groups and other local gatherings which are happening across our nation in most cities from Nashville to Boise.

The TechHire initiative builds on work communities have already started to connect more Americans to well-paying technology jobs through a potent combination of new tools and training models. In March 2015, the President announced that 21 communities committed to take action – with each other and with more than 300 national employers – to expand access to tech jobs as they work to surface and support local employer demand. In June, during the U.S. Conference of Mayors, the President set the goal to double the number of communities participating in the TechHire Initiative to reach 42 in the first year.

Since then, cities, states, and rural areas have been continuing to join. And on the one-year Anniversary of TechHire, on March 9th 2016, we announced the we have exceeded that goal with 15 new communities signing on, putting us at 50 total working with 600 companies.

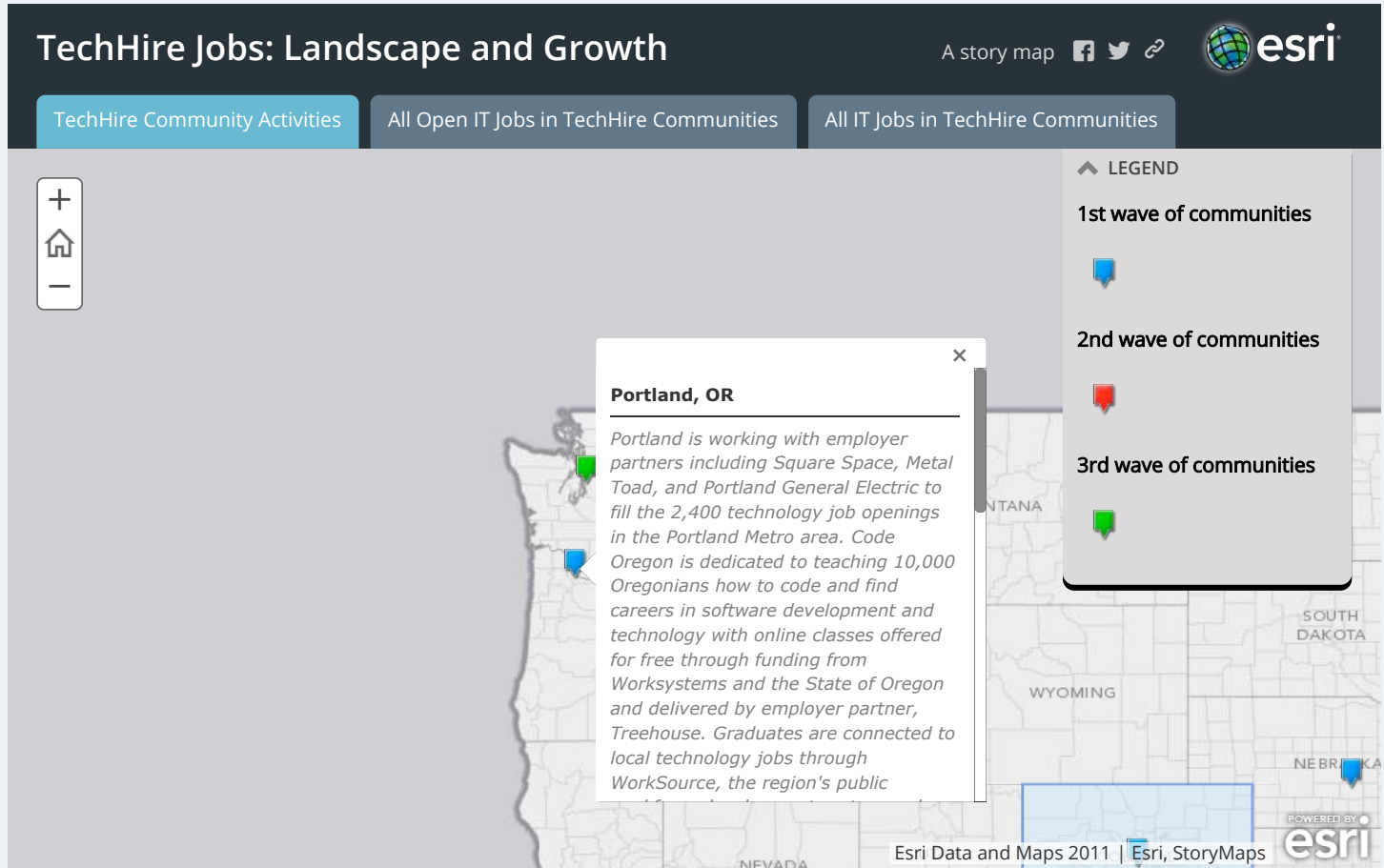
The maps below highlight the communities that are stepping up and responding to the President's call to action, and the jobs that are waiting for you in the tech sector. The first map shares stories about each community, the second shows how many open information technology jobs



are in each community's metro area (based on data from Burning Glass), and the third shows how many total information technology jobs are in each community (based on data from EMSI).

We want to get more onboard. Because ultimately, success is going to rest on mayors, councilmembers, local leaders. You have got the power to bring your communities together and seize this incredible economic development opportunity that could change the way we think about training and hiring the workers of tomorrow. And the good news is these workers may emerge from the unlikely places."

– President Barack Obama, TechHire Launch March 9th, 2015



Or view the map fullscreen here. (<https://www.arcgis.com/apps/MapSeries/index.html?appid=1cdc6ac71cd54b11b9af0b5ac62f0858>)

When the President launched TechHire a year ago today, he highlighted the story of LaShana—who, as he said then, “refused to give up on her dream, and used her free time to teach herself new computer skills. And she started going to a coding ‘meetup’ that was run by LaunchCode, which is a non-for-profit that finds talented people across St. Louis and gives them the training and credibility for the tech jobs employers are desperately needing to fill as we speak. So LaShana had the skills. LaunchCode went to bat for her. And today, she’s a systems engineer at MasterCard.”

And with that story, the President challenged communities nationwide to provide opportunities for their workers to access tech jobs. And now, a total of 50 communities have taken up that challenge. See additional TechHire stories below and in the Stories section, with thousands more still being told across the country.

Garland C. (KY)

Thaddeus D. (OH)

Michelle S. (NE)

For Immediate Release

March 09, 2015

## **FACT SHEET: President Obama Launches New TechHire Initiative**

*President Obama Announces Multi-Sector Effort and Call to Action to Give Americans Pathways to Well-Paying Technology Jobs; Makes Available \$100 Million in Grants*

The President and his Administration are focused on promoting middle class economics to ensure that all Americans can contribute to and benefit from our American resurgence. Part of that effort requires empowering every American with the education and training they need to earn higher wages. Today's announcement is the latest part of that effort: In his remarks to the National League of Cities, the President will announce his [TechHire initiative](#), including a new campaign to work with communities to get more Americans rapidly trained for well-paying technology jobs.

Middle class economics has driven the President from day one, and it is what has fueled our comeback. On Friday, we learned that our economy created nearly 300,000 new jobs in February. American businesses have now added more than 200,000 jobs a month for the past 12 months, the longest streak of job creation at that pace in 37 years. All told, over the past five years, our businesses have created 12 million new jobs.

While we are seeing an economic resurgence, the President has made clear that there is still work left to do. America has about 5 million open jobs today, more than at any point since 2001. Over half a million of those job openings are in information technology fields like software development, network administration, and cybersecurity- many of which did not even exist just a decade ago. The average salary in a job that requires information technology (IT) skills - whether in manufacturing, advertising, retail or banking - is 50 percent higher than the average private-sector American job. Helping more Americans train and connect to these jobs is a key element of the President's middle-class economics agenda.

As part of that agenda, **TechHire** is a bold multi-sector effort and call to action to empower Americans with the skills they need, through universities and community colleges but also nontraditional approaches like "coding bootcamps," and high-quality online courses that can rapidly train workers for a well-paying job, often in just a few months. Employers across the United States are in critical need of talent with these skills. Many of these programs do not require a four-year degree. Key elements of the initiative include:

- Over twenty forward-leaning communities are committing to take action - working with each other and with national employers - to expand access to tech jobs. To kick off TechHire, 20 regions, with over 120,000 open technology jobs and more than 300 employer partners in need of this workforce, are

announcing plans to work together to new ways to recruit and place applicants based on their actual skills and to create more fast track tech training opportunities. The President is challenging other communities across the country to follow their lead.

- \$100 million in new Federal investments to train and connect more workers to a good job in technology and other in-demand fields. The Administration will launch a \$100 million H-1B grant competition by the Department of Labor to support innovative approaches to training and successfully employing low-skill individuals with barriers to training and employment including those with child care responsibilities, people with disabilities, disconnected youth, and limited English proficient workers, among others. This grant competition will support the scaling up of evidence-based strategies such as accelerated learning, work-based learning, and Registered Apprenticeships.
- Private sector boosts tools and resources to support and expand continued innovation in technology training, with a focus on reaching under-served populations. Private sector leaders are announcing commitments to provide free training through online training slots and expanding “coding bootcamps” – which provide intensive training for well-paying jobs, often in the course of just a few months – to low-income and underserved Americans including women, minorities, and veterans across the nation. National organizations are committing to work with interested cities to share job and skills information, job-matching tools, and other resources to help support the growth, adoption, and creation of promising practices across the United States.

### **Details on the Tech Hire Initiative**

The TechHire initiative builds on work communities like Louisville, St. Louis, Philadelphia, New York City and the State of Delaware are doing to connect more Americans to well-paying technology jobs through a potent combination of new tools and training models:

Over twenty forward-leaning communities are committing to take action – with each other and with national employers – to expand access to tech jobs: The TechHire initiative will achieve its goals by connecting communities together so promising ideas happening in one community can be rapidly adopted by other regions. Today, 21 communities are stepping up and responding to the President’s call-to-action, [including](#):

Louisville	New York City	Philadelphia	Delaware	City of Kearney and Buffalo County, NE
Colorado		St. Louis	Salt Lake City	San Antonio
Los Angeles	Minneapolis	Kansas City	Memphis	Rural
Eastern Kentucky				
Nashville	Rochester	Detroit	San Francisco	Albuquerque
Chattanooga		Portland		

Building on the promising work already underway in their communities, they are all committing to three actions:

- Using data and innovative hiring practices to expand openness to non-traditional hiring: Having a data-driven assessment of employer demand is critical to building a successful regional strategy. Communities are committing to work with employers to build robust data on where they have greatest needs and what skills they are looking for; communities will work with employers to build willingness to hire from both nontraditional and traditional training programs; and communities will work with employers to review -and upgrade -their recruiting and hiring practices to enable non-traditional hiring.
- Expanding models for training that prepare students in months, not years: Communities will recruit, incubate and expand accelerated tech learning programs – such as coding bootcamps and innovative online training – which enable interested non-tech-experienced students to gain coding skills in months, not years. These new models also have potential to reaching to a broader set of students than have traditionally chosen to pursue tech careers. These new training programs can be run both independently or embedded as part of a local community college or university education offering.
- Active local leadership to connect people to jobs with hiring on ramp programs: Communities will build local strategies and partnerships to connect people to jobs, with steps ranging from investing in and working with industry-trusted organizations, which will vouch for those who have the skills to do the job but who may lack the typical profile of degrees and career experience. They will host local tech community gatherings with engaged employers, attract new non-traditional training providers to their regions, and bring visibility to existing local activities such as tech meet-ups, startup co-working spaces or startup-weekends - which are already in place in most middle-size cities or encouraging the founding of these groups if they are not available locally.

The Administration is encouraging more communities and employers to follow in their lead with similar innovative strategies to advance these goals.

#### *Examples of TechHire Community Commitments*

- St. Louis, MO. A network of over 150 employers in St. Louis' rapidly expanding innovation ecosystem will build on a successful Mastercard pilot to partner with local non-profit Launchcode, to build the skills of women and underrepresented minorities for tech jobs, and will also place 250 apprentices

in jobs in 2015 at employers like Monsanto, CitiBank, Enterprise Rent-a-Car, and Anheuser Busch.

- New York City, NY. With employers including Microsoft, Verizon, Goldman Sachs, Google, and Facebook, the Tech Talent Pipeline is announcing new commitments to prepare college students in the City University of New York (CUNY) system for and connect them to paid internship opportunities at local tech companies. NYC will also expand successful models like the NYC Web Development Fellowship serving 18-26 year olds without a college degree in partnership with the Flatiron School.
- State of Delaware. The new Delaware TechHire initiative is committing to training entry-level developers in a new accelerated coding bootcamp and Java and .Net accelerated community college programs giving financial institutions and healthcare employers, throughout the state, access to a new cohort of skilled software talent in a matter of months. Capital One, Bank of America, Christiana Care and others are committing to placing people trained in these programs this year.
- Louisville, KY. Louisville has convened over 20 IT employers as part of the Code Louisville initiative to train and place new software developers, including Glowtouch, Appriss, Humana, Zirmed, and Indatus. Louisville will build on this work in support of the TechHire Initiative: the city will recruit a high-quality coding bootcamp to Louisville and establish a new partnership between Code Louisville and local degree granting institutions to further standardize employer recognition of software development skillsets.

**A \$100 million competition for innovative approaches to connect Americans with disabilities, disconnected youth, and others to the fastest path to a good job in technology and other in-demand fields.**

Today the Administration is announcing its commitment to make \$100 million available through the Department of Labor to support innovative approaches to moving lower skilled workers with barriers to training and employment on the fastest paths to well-paying information technology and high growth jobs in industries like healthcare, advanced manufacturing, financial services and other in-demand sectors. The grant will focus on providing workers the skills for a pathway to the middle class while providing employers with the skilled technology workers need to grow and expand. This grant will serve people with barriers to accessing training including people with childcare responsibilities, people with disabilities, people with limited English proficiency, and disconnected youth, among others. It will serve both unemployed and low skilled front line workers.

Grants will pilot and scale innovative partnerships between employers, workforce boards, training institutions, non-profit organizations, and cities and states across the country. These partnerships will support the implementation of job-driven training strategies to help workers complete basic and technical skills training using evidence-based strategies such as accelerated learning, work-based learning and Registered Apprenticeships. A solicitation for applications for these partnerships will

be available this fall and awards will be made next year. These grants will be financed by a user fee paid by employers to bring foreign workers into the United States under the H-1B nonimmigrant visa program.

**Private sector leaders are announcing tools and resources to scale continued innovation in technology training, with a focus on reaching under-served populations.**

*Expanding accelerated models for training in months not years:*

- A group of 10 bootcamps are jointly announcing a shared, third-party validated format for annually publishing completion and employment outcomes to help continue to drive innovation in the bootcamp model.
- The accelerated training providers **Dev Bootcamp, Hack Reactor, Microsoft, Treehouse Island, Inc., and Udacity** will all be expanding free or discounted training slots for underserved communities and individuals.
- **General Assembly** will work with community colleges, other training providers, and employers with the aim of further standardizing web development training.
- **Flatiron School, Hackbright Academy, and Rural Sourcing** are announcing they will provide pro bono consulting to help interested communities expand and improve training.
- Cisco will provide select individuals interested in career opportunities in IT with free access to online IT networking skills including hundreds of online training assets.

*Support for local leaders:*

- **Opportunity@Work**, a national civic enterprise that is launching at New America today, will aim to connect policy to action and will collaborate with private and philanthropic partners to create freely available tools to scale-up employer commitments to inclusive hiring practices, to facilitate a nationwide learning network for communities, and to create new financing to help lower-income Americans be trained and placed into technology jobs.
- **Capital One**, through its FutureEdge initiative, a \$150 million effort that will help increase tech skills and hiring, will collaborate with Opportunity@Work to provide support tailored to the needs of communities.
- **#YesWeCode** commits to delivering \$10 million in scholarships for 2,000 underserved minorities across the nation, to attend coding bootcamps over the next ten years.

*Using data and innovative hiring practices to expand hiring to include non-traditional training paths:*



- **CEB** will develop their own best practices playbook for employers with guidance to private and public employers on how to recruit tech talent from non-traditional sources.
- **LinkedIn** will provide free data about the supply and demand of IT skills to communities to help them identify shortages and focus training resources on skills most in-demand.
- **Knack** will for the first time make its aptitude test technology available free of charge to employers, communities, and accelerated training providers that are launching inclusive training and hiring campaigns aimed at underserved minorities, women, and veterans.

A complete list of private sector commitments can be found [here](#).

**The President's Agenda to Create Pathways to the Middle-Class Through High-Quality, Job-Driven Training. TechHire is part of the President's broader agenda to invest in job-driven training:**

- Vice-President Biden's Job-Driven Training Review. The President's TechHire initiative builds on the job-driven training review that the President asked the Vice President to lead in the 2013 State of the Union. Amongst other findings, the Vice President's review identified information technology generally and cybersecurity in particular as an emerging area of growth that requires job-driven training strategies to meet business needs and provide more workers with a path to the middle class.
- VA Accelerated Learning Competition. To ensure that Veterans can take full advantage of innovative learning models, VA will apply \$10M in innovation funding to leverage accelerated learning and test its effectiveness for transitioning Servicemembers and Veterans over the next two years. VA will concentrate this initiative in communities where conditions are conducive for VA to provide industry-specific and place-based support to Veterans and transitioning Servicemembers
- American Apprenticeship Grant Competition. Last year, DOL opened a \$100 million competition to spur partnerships between employers, labor, training providers, and local governments to expand apprenticeships into high-growth fields like information technology and scale models that work. The deadline for this application is April 30, 2015, and more information is available at the [Grants.gov application page](#).
- Information Technology Industry-Credentialing partnerships. The President's FY2016 budget proposes \$300 million to fund IT jobs partnerships between regional employers to develop and adopt assessments and credentials that will give more people the chance to qualify for a better, higher-paying tech job regardless of their pedigree.

DETAILS () LOCATION ()

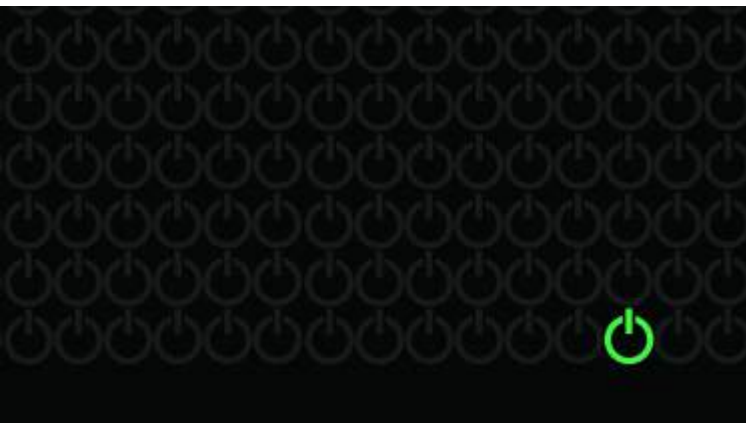
DESIGN+CULTURE

# TECH + INCLUSION: A COMMUNITY CONVERSATION

By: PDC TECHTOWN

DETAILS () LOCATION ()

DESIGN+CULTURE



## TECH + INCLUSION: A COMMUNITY CONVERSATION

By: PDC TECHTOWN

THIS EVENT HAS ENDED.

Portland's technology community has much to celebrate; however, when it comes to having an inclusive and diverse industry we must improve. Diversifying our workforce to include all from our community is the right thing to do, and the data shows it benefits us in terms of innovation, team functioning, and bottom line results. We know that greater diversity leads to greater innovation.

Tech + Inclusion Community Conversation is an opportunity for companies who have joined the PDC Diversity Pledge and the community to come together.

This event is open to those working in the tech sector, to students and prospective tech sector workers, and those interested in working in the tech industry. The Tech + Inclusion event will help create partnerships that assist in hiring and career advancement of women and people of color in Portland's Tech industry.

Event Partners: Instrument, Scale Up Partners, Code Fellows, ELI Program and Worksystems Inc.

Event Sponsors: Portland Development Commission - Techtown Program

---

**REGISTER NOW** → ()





3529 N WILLIAMS AVE, PORTLAND, OR 97227, USA

**EVENT ORGANIZER**  
**DESIGN + CULTURE**

PDC TECHTOWN

 [Contact \(\)](#)

**OTHER EVENTS BY THIS ORGANIZER**



## NORTH WILLIAMS CENTER COMMUNITY OUTREACH EVENT

THU, APR 27 6:00 PM

By: Design+Culture Lab

 [View Event \(/event/north-williams-center-community-outreach-event-1784\)](/event/north-williams-center-community-outreach-event-1784)

Powered by





# TECH + INCLUSION A COMMUNITY CONVERSATION

Networking

Welcome | Jasmine Rucker

Techtown Initiative and the Diversity Pledge | Jared Weiner

Event Partners:

Program | Adam Ristick

ws Diversity Scholarship Program | Jordana Gustafson

nc. | Reese Lord

eration | Joy Alise Davis

What does diversity and  
inclusion mean for the Portland  
Tech community?



JOIN THE CONVERSATION  
#TECHTOWNPDX





From the Portland Business Journal:

<http://www.bizjournals.com/portland/blog/techflash/2015/06/thousands-of-oregon-codingnewbies-to-get-a-guiding.html>

## Thousands of Oregon coding newbies to get a guiding hand

Jun 19, 2015, 11:00am PDT

A pair of Web development trainers will offer tutoring for the thousands of students enrolled in a popular coding program.

The partnership between Code Fellows and Portland Code School, called Code Oregon Labs, aims to offer monthly in-person tutoring. The assistance is available to the thousands of Code Oregon program enrollees.

Code Fellows and Portland Code School are just two of several Portland-area schools designed to train people for Web development jobs.

Code Oregon is a project between Treehouse, a Portland-based online code school and the state's Worksystems program. With Code Oregon, the state offers Treehouse courses for free.

When Code Oregon initially launched, Treehouse CEO Ryan Carson said he wanted to train 10,000 Oregonians for jobs in the region's growing tech sector. The program is designed to train people to code and hopefully land entry level developer positions.

Code Oregon was announced last summer and by the fall it had already gathered 6,000 applicants.

Code Oregon is meant to be an online program, but not everyone thrives in online-only learning.

That is where Code Oregon Labs comes in.

Since Code Oregon launched both Code Fellows and Portland Code School have been fielding calls from those students looking for real world tutors, said Jordana Gustafson, Portland campus manager for Code Fellows.

Gustafson and Portland Code School's Cris Kelly decided to provide one night a month free tutoring session with tutors provided by each school. The first session is slated for June 25.

The two would also solicit volunteers from local companies, she said. Initially, they thought the event would top out at 30 people and two tutors.

So far, 75 people have applied to participate and four tutors have signed on.



SPAXIAX

Two Portland code schools are hosting tutoring sessions to help students enrolled in the online Code Oregon program.

“The initial plan is to put two (sessions) on the schedule (of Code Oregon Labs) and trade off hosting and see if there is interest,” Gustafson said. “We immediately see a lot of interest and need.”

More sessions are in the works.

**Malia Spencer**

Staff Reporter

*Portland Business Journal*



PORTLAND, Ore.--(BUSINESS WIRE)-- While jobs in the technology industry continue to grow at unprecedented rates, the lack of diversity remains an issue. For example, [women only fill 20% of positions in tech and Hispanics and African Americans combined only comprise 8% of the technical workforce](#). Diversity in tech is good for everyone: the industry benefits from new ideas, solutions, and better products, all while providing careers with great benefits and mobility to those looking for opportunity. Which is why Treehouse is launching a \$1M Tech Ed Scholarship Program focused specifically on nonprofits that offer support to veterans, underrepresented populations in technology, and those with socio-economic barriers. Through our scholarship program, we will give nonprofits the tools to help individuals gain access to education and take control of their future.

This Smart News Release features multimedia. View the full release here:<http://www.businesswire.com/news/home/20161129005973/en/>

Treehouse Launches Tech Ed Scholarship Program (Graphic: Business Wire)

## Partner with Us

Treehouse is currently accepting applications from nonprofits as we rollout the seat-matching donation portion of our scholarship program. For organizations who qualify, Treehouse will double the amount of account seats, so we can continue to expand access to quality tech education. If you work with a nonprofit that could benefit from a Treehouse for Business account, nominate or urge them to apply today at [teamtreehouse.com/scholarships](http://teamtreehouse.com/scholarships). Together, we can do more.

“Access to an affordable education in technology is essential to continue to break down barriers in the field. But too often women, minorities, veterans and the socio-economically disadvantaged need services beyond the classroom. By partnering with nonprofits who can offer additional support we are setting people up for success,” said Emily Schweiss, Sales Director of Treehouse for Organizations.

## First Scholarship Recipients

Today, it is our honor to announce the first three recipients, who each received an annual Treehouse for Business account. These organizations have done tremendous work for their respective communities to break down barriers and empower people and we’re excited to support their efforts.

Veteran-founded and led, [Operation Code](#) is on a mission to get active military, citizen-soldiers, veterans, and their families coding and building software to change the world.

[Path Forward](#) is a nonprofit organization on a mission to get people back to work after they’ve taken time off to care for a loved one. They work with companies to create mid-career internship opportunities to re-enter the paid workforce.

[LaunchCode](#) is a nonprofit organization dedicated to creating economic opportunity for aspiring developers through job placement and training in technology.

**To learn more about the Treehouse Scholarship program, schedule an interview by contacting [scholarship@teamtreehouse.com](mailto:scholarship@teamtreehouse.com).**

## About Treehouse

Treehouse is an online education platform that specializes in technology. With a robust content library spanning 17 topics, our students range from absolute beginner to professional developer. Headquartered in Portland, Oregon, Treehouse has provided outstanding tech education for over 6 years, and currently has 75k enrolled students. Visit [teamtreehouse.com](http://teamtreehouse.com) to learn more.

View source version on [businesswire.com](http://businesswire.com): <http://www.businesswire.com/news/home/20161129005973/en/>

Treehouse

Emily Schweiss

[emily@teamtreehouse.com](mailto:emily@teamtreehouse.com)

Source: Treehouse

# Treehouse Partners with Girls Inc., ChickTech and Clinton Global Initiative to Change the Ratio of Women in Tech

Latest partnerships support Treehouse's commitment to spur economic empowerment and fill 150,000 coding jobs by 2018

Aug 13, 2014, 12:00 ET from Treehouse



Treehouse Logo. (PRNewsFoto/Treehouse)

[Facebook](#) [Twitter](#) [Pinterest](#)

PORTLAND, Ore., Aug. 13, 2014 /PRNewswire/ -- Following a pivotal national education and job placement commitment with the Clinton Global Initiative, Treehouse is putting its movement for economic equality into action with today's launch of "Change the Ratio." In partnership with Girls, Inc. and ChickTech, Change the Ratio is designed to inspire and empower young women around the nation to pursue careers in technology.

Computing jobs are growing at twice the national average and pay 75 percent more than the median annual salary. Women hold less than 25 percent of high-paying computer-science related positions, so there is a need for technology companies to close the gender wage gap and help place more women in technology positions.

"Nationally, women earn 77 percent less than men across all industries," said Ryan Carson, co-founder and CEO of Treehouse. "That doesn't work for us and we want to do something about it. By creating a fun, hands-on, educational technology experience at an early age, we'll aim to spur curiosity among young minds and empower girls to pursue high-paying careers in technology."

Changing the ratio starts with providing early, skill-based tech education, which is something Treehouse does well. To give young women a leg up in mastering technology skills of the future, Treehouse has provided online learning scholarships to Girls Inc., Chick Tech, National Council for Women in Technology and other female-empowerment organizations across the country.

To kick off the Change the Ratio initiative, Girls Inc. Eureka! groups from the Portland, Ore. area will participate in a technology workshop, an "Introduction to Front End Web Development," led by Treehouse instructor Joy Kesten and guest speaker Lakecia Gunter, corporate vice president of Intel Labs and chief technology officer of Intel Corporation. Following the workshop, Treehouse will host a networking event to build and connect young aspiring women with female mentors and role models who will facilitate internships and career opportunities.

"By 2020 there will be one million more coding jobs available in the U.S. than there are people to fill them," said Joy Kesten of Treehouse. "That translates into \$500 billion in annual salaries. We want to help women land their share of those high-paying technology jobs of the future by giving them the skills and career-ready training they'll need to succeed."

The Change the Ratio program is part of the Treehouse Code-to-Work initiative, a national program to educate and put 150,000 people to work in rewarding technology and coding jobs. For more information about Change the Ratio or to get involved as a mentor, visit [www.teamtreehouse.com](http://www.teamtreehouse.com).

**About Treehouse**

The Treehouse mission is providing affordable technology education to people everywhere, in order to help them achieve their dreams and change the world. As members of the Treehouse community, students can learn to build websites, create iPhone and Android apps, build Web apps with Ruby on Rails and PHP, learn about user experience and how to start a business, and much more. Through 1000+ video tutorials, quizzes and code challenges created by expert teachers, students can learn to code in languages like ObjectiveC, HTML, CSS, PHP, Ruby, JavaScript and SQL. For more information, visit [www.teamtreehouse.com](http://www.teamtreehouse.com).

#### **About Girls Inc.**

Girls Inc. inspires all girls to be strong, smart, and bold, providing more than 138,000 girls across the U.S. and Canada with life-changing experiences and real solutions to the unique issues girls face. Girls Inc. gives girls the right tools and support to succeed, including trained professionals who mentor and guide them in a safe, girls-only environment, research-based programming, and peers who share their drive and aspirations. At Girls Inc., girls learn to set and achieve goals, boldly confront challenges, resist peer pressure, see college as attainable, and explore nontraditional fields such as STEM. Girls Inc. also works with policymakers to advocate on key legislation and initiatives.

With Girls Inc. in her corner, every girl can be healthy, educated, and independent. Join us at [www.girlsinc.org](http://www.girlsinc.org).

#### **About ChickTech**

ChickTech is a multi-generational community of women and girls dedicated to retaining women in the technology workforce and increasing the number of women and girls pursuing technology-based careers. For more information, visit [www.chicktech.org/](http://www.chicktech.org/).

#### **About the Clinton Global Initiative America**

The Clinton Global Initiative America (CGI America), a program of the Clinton Global Initiative, addresses economic recovery in the United States. Established in June 2011 by President Bill Clinton, CGI America brings together leaders in business, government, and civil society to generate and implement commitments to create jobs, stimulate economic growth, foster innovation, and support workforce development in the United States. Since its first meeting, CGI America participants have made over 300 commitments valued at more than \$15 billion when fully funded and implemented. To learn more, visit [cgiamerica.org](http://cgiamerica.org).

Established in 2005 by President Bill Clinton, the Clinton Global Initiative (CGI), an initiative of the Bill, Hillary & Chelsea Clinton Foundation, convenes global leaders year-round and at its Annual Meeting to create and implement solutions to the world's most pressing challenges. CGI also convenes CGI University, which brings together undergraduate and graduate students to address pressing challenges in their communities and around the world. To date, members of the CGI community have made more than 2,800 Commitments to Action, which are already improving the lives of more than 430 million people in over 180 countries. When fully funded and implemented, these commitments will be valued at \$103 billion. For more information, visit [clintonglobalinitiative.org](http://clintonglobalinitiative.org) and follow us on Twitter @ClintonGlobal and Facebook at [facebook.com/clintonglobalinitiative](https://facebook.com/clintonglobalinitiative).

Logo - <http://photos.prnewswire.com/prnh/20140313/NE82370>LOGO

SOURCE Treehouse

#### **RELATED LINKS**

<http://teamtreehouse.com>



## TREEHOUSE'S MISSION TO CHANGE TECH

by Jenna Abdou

SHARE

<http://33voic.es/pnd1683>



Alan Johnson (<http://commondream.net/>) is a builder. Whether he's building websites, designing mobile apps or growing a team, everything he does lends to his work building Treehouse ([http://teamtreehouse.com/join/first-week-free?utm\\_source=google&cid=1027&gclid=CKuDrdSomMECFZSffgodtLSOAIw](http://teamtreehouse.com/join/first-week-free?utm_source=google&cid=1027&gclid=CKuDrdSomMECFZSffgodtLSOAIw)), an online coding school teaching students how to code and design websites for \$25 each month.

INTERVIEWS (/INTERVIEWS)

Although he's constantly creating in a literal sense, Alan's highest goal is to build one thing - A meaningful life. To do so, he's adamant about being deliberate and his quest to achieve it extends far beyond Treehouse's classes and resides in the heart of each company operation.

Q&A (/QUESTIONS-AND-ANSWERS)

The team's mission is highlighted in their Code to Work (<http://www.code2work.org/>) campaign which they're pioneering alongside the Clinton Code Initiative (<https://www.clintonfoundation.org/clinton-global-initiative>). Code to Work is designed to train 150,000 individuals to code and place them in careers by 2018. To support the campaign, the team's also partnered with Girls Inc. ([http://www.girlsinc.org/resources/programs/girls-inc-operation-smart.html?gclid=CP7\\_-JG1mMECFQ9cfdtF4AmQ](http://www.girlsinc.org/resources/programs/girls-inc-operation-smart.html?gclid=CP7_-JG1mMECFQ9cfdtF4AmQ)) and ChickTech (<http://chicktech.org/>) on Change the Ratio (<https://www.33voic.es/news-releases/treehouse-partners-with-girls-inc-chicktech-and-clinton-global-initiative-to-change-the-ratio-of-women-in-tech-271092321.html>), a Treehouse scholarship program for women to learn how to code. Subscribing to the notion that software is the future of self expression, the Treehouse team is adamant about changing the status quo for women in tech, which currently indicates that less than 25 % of tech jobs are held by females. The team is highly dedicated to connect individuals to careers which they do at their Career Resources Center.

Between four day work weeks and a manager free organization, Alan and his co-founder Ryan Carson (<https://twitter.com/ryancarson>) are dedicated to finding team members who are driven by the desire to help Treehouse students learn. To learn more about the leaders emerging on their team and how they're achieving their goal to change tech, tune into our conversation with Alan on 33founders.

SHARE

<http://33voic.es/pnd1683>



### FURTHER READING

Inside The Muse's Founding Story with Editor-in-Chief Adrian Granzella Larssen (/posts/inside-the-muses-founding-story-with-adrian-granzella-larssen) — One of my most special interviews was with Jeff Wald, the Co-Founder and President of Work Market. Although Jeff introduced me to the rise of the soon to be trillion dollar freelance economy, I was most intrigued by his description of Phase One people - The team members who worked on the earliest iterations of Work Market.

Senior Care Marketplace HomeHero Announces Series A to Expand Across California (/posts/senior-care-marketplace-homehero-announces-series-a-to-expand-across-california) — Kyle Hill and Mike Townsend launched HomeHero in 2014 to ensure that our elderly loved ones can age with the in-home care they need. Only a year and a half in, more than 1,500 Heroes, HomeHero caregivers, have provided 1 million hours of care to seniors in Los Angeles and the broader San Diego area.

**The Growth Culture: Why Sustainable Startups Default to Transparency** (/posts/the-growth-culture-why-sustainable-startups-default-to-transparency) — When I first met Mike Townsend, the Co-Founder and COO of HomeHero, the team was nine people working out of Science Inc., Mike Jones' startup studio in Santa Monica. His co-founder Kyle Hill and him joined us from separate computers to minimize the noise and shared their goals to transform the senior care industry.

---

**WRITTEN BY**

**Jenna Abdou**  
Founders Series Producer

---

**PUBLISHED IN****Programming**[More in Programming →](#)

---

**Comments**

Please sign in (/users/sign\_in) or register (/users/sign\_up) to comment.

No comments have been added.

---

[← back to the blog \(/blog\)](#)

(<https://itunes.apple.com/us/podcast>

[About Us \(/about\)](#) [Blog \(/blog\)](#) [Privacy Policy \(/legal/privacy\)](#) [Nominate a Voice \(/forms/new\\_nomination\\_form.html\)](#)

©2015 33voices, Inc.

16236 San Dieguito Road, Suite 1-08

Rancho Santa Fe, CA 92067

1-858-832-8997

All rights reserved



twee  
(331) 425-4904



15



What time is the event? Let me know. Thanks ben.

Hi ben isaac just told me a competition last night to win 50K if selected. It is called **startup** pdx challenge 2014 deadline june 23rd for minority women wanting to start a business. We can split if we win, isaac would get a portion too. I just want to get my name out there somehow. I just don't have the time to do any research and also not as smart as u are.

I was thinking of the top tiny homes. U can google it and get all kinds of great ideas. I want to use that as my topic. Isaac and i went to visit some tiny homes last night and i loved the idea. I want to own a tiny home myself! Well the list fr the competition does ask for a lot, a lot of stuff so i am hoping we can meet the deadline by june 23rd. Check it out and let me know if u are able to help me for this competition. If not, i am sure there will be more opportunities later. Thanks ben.

T

Typo i was thinking topic: tiny homes.

twee (mobile) • Jun 21, 2014

Hi thuy, Im working on a database for a Orthopedics office, knee doctor, and there is a doctor who I think you should meet, that you might have interest in ;-)

The owner of the office thinks you should meet him, and you two might be compatible \*wink\*. Matthew Sugalski M.D [503.659.1769](tel:503.659.1769)

I have at least another day worth of work, I can take off if you really want, but you also have the invoice number, and can take a friend instead. geek olympic

Jun 21, 2014

Thanks, what time is the geek thing? Can u resend me it, i accidentally deleted your text by mistake,

T

didn't have on my contacts. Ok let me think about it, i really want to compete in this competition though.

twee (mobile) • Jun 21, 2014

Its going on now, check the internet, there is a map and schedule online

I'm getting off the max, Gonna take a shower, got really really good news. And yes, I'll help with the business.

I'm getting off the max, Gonna take a shower, got really really good news. And yes, I'll help with the business.

So, the owner of the business is half chinese/vietnamese, and thinks you'd be perfect match for one of his doctors, and wants to introduce you to him.

moreover, he is also working on wearable technology like I am, and wants to bankroll the development of my technology products, and has alot more work for me.

The owner is sympathetic to your knee problems, and that is what they specialize in, his wife is also getting a surrogate as well. Maybe he knows the right doc

Looks like the geek olympics ends at mississippi pizza, I'm going there now. I want to work on your project as well, since the deadline is so close.

I do appreciate that you dislike texting when you're out with people, but with the deadline looming i need to know how to schedule my time ASAP.

Jun 21, 2014

T

Sorry ben just did a few hours bike ride and fixing my bike. I just got home a second ago.

twee (mobile) • Jun 21, 2014

okay, So are we working on this project?

I'm going to go bike over to safeway to get something to eat. do you want to meet me there.

I'm leaving this instant to safeway to get caffiene and food, I plan on not sleeping if we're working on this.

Jun 21, 2014

T

Wow i just need like 30 mins of rest, so tired! Sure can we start at 630 or 7pm? U think it is possible to even compete this thing last min, just like the 50K lol?

twee (mobile) • Jun 21, 2014

do you think I'm the kind of person that leaves 50k on the table? I'm done at safeway, but my battery is dead, so I'm charging at the psu library

Jun 21, 2014

Ok charge it and then text me i will run out. I know 50K sounds amazing right now, especially lentil soup for 1.5 weeks plus!

T

Well let me know if u want me to meet up at psu library, i will leave here at 7pm.

twee (mobile) • Jun 21, 2014

I am going to your house right now.

Jun 21, 2014

T

Ok just text me and i will run out.

twee (mobile) • Jun 21, 2014

im here

Jun 21, 2014

Ok i will be out in 2 mins

Thank u so much ben for all of your help, we will win



this!! I will guard your computer with my life, see u tomorrow at 6 or 7pm. Good night.

twee (mobile) • Jun 21, 2014





benjamin barber <starworks5@gmail.com>

---

## NDA

3 messages

---

**Tyrone Poole** <tyrone@noappfee.com> Mon, Mar 3, 2014 at 2:23 PM  
To: barberb@barberb.com, Sylvan Ecohouse <travis@northwestmediacollective.com>


Ben

Please sign and return this NDA. Ounces received I will send you the access information to the back end of NoAppFee.com. Also, please send your portfolio of any relevant previous work to [travis@northwestmediacollective.com](mailto:travis@northwestmediacollective.com) for review. Thank you!

--

Tyrone Poole | 503.421.0566  
[www.noappfee.com](http://www.noappfee.com)

---


 2014\_03\_03\_13\_49\_50.pdf  
422K

---

**benjamin barber** <barberb@barberb.com> Wed, Mar 5, 2014 at 10:57 AM  
To: Tyrone Poole <tyrone@noappfee.com>

[Quoted text hidden]

---

 2014\_03\_03\_13\_49\_50-signed.pdf  
436K

---

**Tyrone Poole** <tyrone@noappfee.com> Wed, Mar 5, 2014 at 1:48 PM  
To: benjamin barber <barberb@barberb.com>

Good luck! Also, if you haven't already please send some of your previous work to Travis.

----- Forwarded message -----

From: **Travis Buck** <[travis@northwestmediacollective.com](mailto:travis@northwestmediacollective.com)>  
Date: Saturday, March 1, 2014  
Subject: Access info  
To: Tyrone <[tyrone@noappfee.com](mailto:tyrone@noappfee.com)>

Hi Tyrone,

Here is what I have to get onto the website. The FTP is to access and modify the files. The admin panel below has a tiffany login. This is like the super admin. Someone might just need to see your login first, but

to get an idea of size and manager logins (admins that can make new users and all that) then it would be good to use the tiffany login.

noapp fee ftp  
HOST: [noappfee.com](http://noappfee.com) (70.85.226.228)  
USER: noappfee  
PASS: mmappfee12

Noappfee backend  
<http://noappfee.com/admin/>  
[tiffany.roderick@cascade-management.com](mailto:tiffany.roderick@cascade-management.com)  
roderick1

On 3/1/2014 11:26 AM, Tyrone wrote:

| Can u email the info to view the back end of the website please Sent from my iPhone

--

Travis Buck  
T: [503.867.4141](tel:503.867.4141)  
F: [888.654.7119](tel:888.654.7119)  
E: [Travis@NorthwestMediaCollective.com](mailto:Travis@NorthwestMediaCollective.com)  
[NorthwestMediaCollective.com](http://NorthwestMediaCollective.com)

[Quoted text hidden]



benjamin barber <starworks5@gmail.com>

---

## Invoicing

10 messages

---

**Aaron Corpus** <ac@funnelbox.com>  
To: benjamin barber <starworks5@gmail.com>

Mon, Jul 28, 2014 at 9:22 PM

Hi, Ben.

You and I spoke quite frequently at the shoot the other day. Thanks for submitting your invoice. It wasn't till I saw your invoice that I understood how long you were with us that day. Thank you for all your help that day/night.

I will submit your invoice to Accounts Payable.

In addition, in this project, we might use footage showing the artwork you created. If we do end up using that footage, I would like to compensate you \$350 to license that artwork. In the next few days, I would send you a release form seeking your signature. Later on, if that artwork is used in the project, I would be in touch with you to send us a separate invoice for the above amount.

Please get back to me at your earliest convenience.

Thanks much,  
Aaron Corpus

FunnelStripe;

logo **Aaron Corpus** | Director/Producer  
o 503.595.5901 | c 503.318.5777 | www.funnelbox.com

---

**benjamin barber** <starworks5@gmail.com>  
To: Aaron Corpus <ac@funnelbox.com>

Tue, Jul 29, 2014 at 12:07 AM

I am not a greedy person, I just thought I spent a little extra time than I expected to, and I wish would have been able to demonstrate my talents. In my work I always put my full effort and attention to the task, and I did try to forward an asian woman I knew, in addition to the japanese american society of oregon, knowing that you were running up against the clock.

I know that maintaining a good reputation and working relationship means fairness, and in fairness I charge my clients for my time, and I open source a great deal of my work for others to use freely. I realize that the video that you took that day of the dog was likely not that great, if you really feel like its worth \$350 I don't feel like I could argue with that.

However in an effort of good faith I can make a better offer, my neighbor whose worked for you before, named brad norton owes me a favor for web development. I could arrange to have him drive me out to that small studio you mentioned or to the wacom building in vancouver, I could lather on some sunless tanner to get the right complexion you're looking for, and record for a a few hours while simultaneously screen capturing it.

I feel that is worth \$350

As for the discrimination aspect, understand it from my POV, my wife is literally albino legally blind and a

SPED teacher, and I come from an illiterate jewish family with 7 sibilings. so I dont believe in `white privilege`. me and my wife succeeded against the odds, not because our race but because we refused to ever give up, and we made it our life focus to serve the public good as often as we can.

if you really want diversity, I emlore you to consider the disabled.

On Mon, Jul 28, 2014 at 9:22 PM, Aaron Corpus <ac@funnelbox.com> wrote:

Hi, Ben.

You and I spoke quite frequently at the shoot the other day. Thanks for submitting your invoice. It wasn't till I saw your invoice that I understood how long you were with us that day. Thank you for all your help that day/night.


I will submit your invoice to Accounts Payable.

In addition, in this project, we might use footage showing the artwork you created. If we do end up using that footage, I would like to compensate you \$350 to license that artwork. In the next few days, I would send you a release form seeking your signature. Later on, if that artwork is used in the project, I would be in touch with you to send us a separate invoice for the above amount.

Please get back to me at your earliest convenience.

Thanks much,  
Aaron Corpus

FunnelStripe;

 **Aaron Corpus** | Director/Producer  
o 503.595.5901 | c 503.318.5777 | www.funnelbox.com

---

**Aaron Corpus** <ac@funnelbox.com>  
To: benjamin barber <starworks5@gmail.com>

Tue, Jul 29, 2014 at 9:52 AM

Hi, Benjamin.

We are quite content with the artwork you provided and the footage we shot. As to whether the footage and artwork are included in the final cut is another matter. Lots of footage doesn't make the cut for one reason or another. That's just part of the edit process as we weigh our needs in post-production with the budgeted running time of the video. I'm totally happy and prepared to pay you \$350 for your artwork if it does indeed get used in the project. The release I will send you is my effort to prepare for the possibility of using the footage that features your art. Please keep checking your inbox for that release form. Please read it, ask me any questions, and when all looks good, sign and return it to me.

Your efforts and time were very valuable to us on set that day. We were learning how to be a more efficient on-set as we were going, and I'm happy you were there to assist in that manner. \$350 is fair. I feel strongly about that, so let's keep it at that.

Thank you for telling me about you and your wife. Your drive and service-focus shined through on-set.

Thanks,  
Aaron

On Jul 29, 2014, at 12:07 AM, benjamin barber wrote:

I am not a greedy person, I just thought I spent a little extra time than I expected to, and I wish would have been able to demonstrate my talents. In my work I always put my full effort and attention to the task, and I did try to forward an asian woman I knew, in addition to the japanese american society of oregon, knowing that you were running up against the clock.

I know that maintaining a good reputation and working relationship means fairness, and in fairness I charge my clients for my time, and I open source a great deal of my work for others to use freely. I realize that the video that you took that day of the dog was likely not that great, if you really feel like its worth \$350 I don't feel like I could argue with that.

However in an effort of good faith I can make a better offer, my neighbor whose worked for you before, named brad norton owes me a favor for web development. I could arrange to have him drive me out to that small studio you mentioned or to the wacom building in vancouver, I could lather on some sunless tanner to get the right complexion you're looking for, and record for a a few hours while simultaneously screen capturing it.

I feel that is worth \$350

As for the discrimination aspect, understand it from my POV, my wife is literally albino legally blind and a SPED teacher, and I come from an illiterate jewish family with 7 sibilings. so I dont believe in `white privilege`. me and my wife succeeded against the odds, not because our race but because we refused to ever give up, and we made it our life focus to serve the public good as often as we can.

if you really want diversity, I emlore you to consider the disabled.

On Mon, Jul 28, 2014 at 9:22 PM, Aaron Corpus <[ac@funnelbox.com](mailto:ac@funnelbox.com)> wrote:  
Hi, Ben.

You and I spoke quite frequently at the shoot the other day. Thanks for submitting your invoice. It wasn't till I saw your invoice that I understood how long you were with us that day. Thank you for all your help that day/night.


I will submit your invoice to Accounts Payable.

In addition, in this project, we might use footage showing the artwork you created. If we do end up using that footage, I would like to compensate you \$350 to license that artwork. In the next few days, I would send you a release form seeking your signature. Later on, if that artwork is used in the project, I would be in touch with you to send us a separate invoice for the above amount.


Please get back to me at your earliest convenience.

Thanks much,  
Aaron Corpus

FunnelStripe;

 **Aaron Corpus** | Director/Producer  
o 503.595.5901 | c 503.318.5777 | [www.funnelbox.com](http://www.funnelbox.com)

FunnelStripe;

 **Aaron Corpus** | Director/Producer  
o 503.595.5901 | c 503.318.5777 | [www.funnelbox.com](http://www.funnelbox.com)

**benjamin barber** <starworks5@gmail.com>  
To: Aaron Corpus <ac@funnelbox.com>

Mon, Aug 4, 2014 at 1:40 PM

Do you know when accounts payable processes their invoices?

On Tue, Jul 29, 2014 at 9:52 AM, Aaron Corpus <ac@funnelbox.com> wrote:

Hi, Benjamin.

We are quite content with the artwork you provided and the footage we shot. As to whether the footage and artwork are included in the final cut is another matter. Lots of footage doesn't make the cut for one reason or another. That's just part of the edit process as we weigh our needs in post-production with the budgeted running time of the video. I'm totally happy and prepared to pay you \$350 for your artwork if it does indeed get used in the project. The release I will send you is my effort to prepare for the possibility of using the footage that features your art. Please keep checking your inbox for that release form.

Please read it, ask me any questions, and when all looks good, sign and return it to me.

Your efforts and time were very valuable to us on set that day. We were learning how to be a more efficient on-set as we were going, and I'm happy you were there to assist in that manner. \$350 is fair. I feel strongly about that, so let's keep it at that.

Thank you for telling me about you and your wife. Your drive and service-focus shined through on-set.

Thanks,  
Aaron

On Jul 29, 2014, at 12:07 AM, benjamin barber wrote:

I am not a greedy person, I just thought I spent a little extra time than I expected to, and I wish would have been able to demonstrate my talents. In my work I always put my full effort and attention to the task, and I did try to forward an asian woman I knew, in addition to the japanese american society of oregon, knowing that you were running up against the clock.

I know that maintaining a good reputation and working relationship means fairness, and in fairness I charge my clients for my time, and I open source a great deal of my work for others to use freely. I realize that the video that you took that day of the dog was likely not that great, if you really feel like its worth \$350 I don't feel like I could argue with that.

However in an effort of good faith I can make a better offer, my neighbor whose worked for you before, named brad norton owes me a favor for web development. I could arrange to have him drive me out to that small studio you mentioned or to the wacom building in vancouver, I could lather on some sunless tanner to get the right complexion you're looking for, and record for a a few hours while simultaneously screen capturing it.

I feel that is worth \$350

As for the discrimination aspect, understand it from my POV, my wife is literally albino legally blind and a SPED teacher, and I come from an illiterate jewish family with 7 sibilings. so I dont believe in `white privilege`. me and my wife succeeded against the odds, not because our race but because we refused to ever give up, and we made it our life focus to serve the public good as often as we can.

if you really want diversity, I emlore you to consider the disabled.



On Mon, Jul 28, 2014 at 9:22 PM, Aaron Corpus <ac@funnelbox.com> wrote:  
Hi, Ben.


You and I spoke quite frequently at the shoot the other day. Thanks for submitting your invoice. It wasn't till I saw your invoice that I understood how long you were with us that day. Thank you for all your help that day/night.


I will submit your invoice to Accounts Payable.

In addition, in this project, we might use footage showing the artwork you created. If we do end up using that footage, I would like to compensate you \$350 to license that artwork. In the next few days, I would send you a release form seeking your signature. Later on, if that artwork is used in the project, I would be in touch with you to send us a separate invoice for the above amount.

Please get back to me at your earliest convenience.

Thanks much,  
Aaron Corpus

FunnelStripe;  
 **Aaron Corpus** | Director/Producer  
o 503.595.5901 | c 503.318.5777 | www.funnelbox.com

FunnelStripe;  
 **Aaron Corpus** | Director/Producer  
o 503.595.5901 | c 503.318.5777 | www.funnelbox.com

---

**Aaron Corpus** <ac@funnelbox.com>  
To: benjamin barber <starworks5@gmail.com>

Mon, Aug 4, 2014 at 2:50 PM

Hi, Benjamin.

Please see the attached release form allowing permission to use your dog sculpture in the video. Please sign and return to me.

If it is used, then I will ask you to submit an invoice for \$350.

AP will process their invoices within 30 days of receipt. So, for you, it would be around Friday, August 22.

I've also attached a W9 form for you to fill out and sign.

Thanks much!  
Aaron

On Aug 4, 2014, at 1:40 PM, benjamin barber wrote:

Do you know when accounts payable processes their invoices?

On Tue, Jul 29, 2014 at 9:52 AM, Aaron Corpus <[ac@funnelbox.com](mailto:ac@funnelbox.com)> wrote:  
Hi, Benjamin.

We are quite content with the artwork you provided and the footage we shot. As to whether the footage and artwork are included in the final cut is another matter. Lots of footage doesn't make the cut for one reason or another. That's just part of the edit process as we weigh our needs in post-production with the budgeted running time of the video. I'm totally happy and prepared to pay you \$350 for your artwork if it does indeed get used in the project. The release I will send you is my effort to prepare for the possibility of using the footage that features your art. Please keep checking your inbox for that release form. Please read it, ask me any questions, and when all looks good, sign and return it to me.

Your efforts and time were very valuable to us on set that day. We were learning how to be a more efficient on-set as we were going, and I'm happy you were there to assist in that manner. \$350 is fair. I feel strongly about that, so let's keep it at that.

Thank you for telling me about you and your wife. Your drive and service-focus shined through on-set.

Thanks,  
Aaron

On Jul 29, 2014, at 12:07 AM, benjamin barber wrote:

I am not a greedy person, I just thought I spent a little extra time than I expected to, and I wish would have been able to demonstrate my talents. In my work I always put my full effort and attention to the task, and I did try to forward an asian woman I knew, in addition to the japanese american society of oregon, knowing that you were running up against the clock.

I know that maintaining a good reputation and working relationship means fairness, and in fairness I charge my clients for my time, and I open source a great deal of my work for others to use freely. I realize that the video that you took that day of the dog was likely not that great, if you really feel like its worth \$350 I don't feel like I could argue with that.

However in an effort of good faith I can make a better offer, my neighbor whose worked for you before, named brad norton owes me a favor for web development. I could arrange to have him drive me out to that small studio you mentioned or to the wacom building in vancouver, I could lather on some sunless tanner to get the right complexion you're looking for, and record for a a few hours while simultaneously screen capturing it.

I feel that is worth \$350

As for the discrimination aspect, understand it from my POV, my wife is literally albino legally blind and a SPED teacher, and I come from an illiterate jewish family with 7 sibilings. so I dont believe in `white privilege`. me and my wife succeeded against the odds, not because our race but because we refused to ever give up, and we made it our life focus to serve the public good as often as we can.

if you really want diversity, I emlore you to consider the disabled.

On Mon, Jul 28, 2014 at 9:22 PM, Aaron Corpus <ac@funnelbox.com> wrote:  
Hi, Ben.

You and I spoke quite frequently at the shoot the other day. Thanks for submitting your invoice. It wasn't till I saw your invoice that I understood how long you were with us that day. Thank you for all your help that day/night.


I will submit your invoice to Accounts Payable.

In addition, in this project, we might use footage showing the artwork you created. If we do end up using that footage, I would like to compensate you \$350 to license that artwork. In the next few days, I would send you a release form seeking your signature. Later on, if that artwork is used in the project, I would be in touch with you to send us a separate invoice for the above amount.


Please get back to me at your earliest convenience.

Thanks much,  
Aaron Corpus


FunnelStripe;

 **Aaron Corpus** | Director/Producer  
o 503.595.5901 | c 503.318.5777 | www.funnelbox.com

FunnelStripe;

 **Aaron Corpus** | Director/Producer  
o 503.595.5901 | c 503.318.5777 | www.funnelbox.com


FunnelStripe;

 **Aaron Corpus** | Director/Producer  
o 503.595.5901 | c 503.318.5777 | www.funnelbox.com

---

## 2 attachments

 **fw9.pdf**  
110K

 **2014\_ArtworkRelease\_Ben\_Barber\_Wacom.pdf**  
499K

---

**Aaron Corpus** <ac@funnelbox.com>  
To: benjamin barber <starworks5@gmail.com>

Fri, Aug 8, 2014 at 4:03 PM

Hi, Benjamin.

We have your check ready, but need your address. Would you please send that to me, along with the W9 and the Art Release form, at your earliest convenience?

Thanks and have a good weekend,  
Aaron

On Aug 4, 2014, at 2:50 PM, Aaron Corpus wrote:

Hi, Benjamin.

Please see the attached release form allowing permission to use your dog sculpture in the video.  
Please sign and return to me.

If it is used, then I will ask you to submit an invoice for \$350.

AP will process their invoices within 30 days of receipt. So, for you, it would be around Friday, August 22.

I've also attached a W9 form for you to fill out and sign.

Thanks much!  
Aaron

<fw9.pdf>  
<2014\_ArtworkRelease\_Ben\_Barber\_Wacom.pdf>

On Aug 4, 2014, at 1:40 PM, benjamin barber wrote:

Do you know when accounts payable processes their invoices?

On Tue, Jul 29, 2014 at 9:52 AM, Aaron Corpus <[ac@funnelbox.com](mailto:ac@funnelbox.com)> wrote:

Hi, Benjamin.

We are quite content with the artwork you provided and the footage we shot. As to whether the footage and artwork are included in the final cut is another matter. Lots of footage doesn't make the cut for one reason or another. That's just part of the edit process as we weigh our needs in post-production with the budgeted running time of the video. I'm totally happy and prepared to pay you \$350 for your artwork if it does indeed get used in the project. The release I will send you is my effort to prepare for the possibility of using the footage that features your art. Please keep checking your inbox for that release form. Please read it, ask me any questions, and when all looks good, sign and return it to me.

Your efforts and time were very valuable to us on set that day. We were learning how to be a more efficient on-set as we were going, and I'm happy you were there to assist in that manner. \$350 is fair. I feel strongly about that, so let's keep it at that.

Thank you for telling me about you and your wife. Your drive and service-focus shined through on-set.

Thanks,  
Aaron

On Jul 29, 2014, at 12:07 AM, benjamin barber wrote:

I am not a greedy person, I just thought I spent a little extra time than I expected to, and I wish would have been able to demonstrate my talents. In my work I always put my full effort and attention to the task, and I did try to forward an asian woman I knew, in addition to the japanese american society of oregon, knowing that you were running up against the clock.

I know that maintaining a good reputation and working relationship means fairness, and in fairness I charge my clients for my time, and I open source a great deal of my work for others to use freely. I realize that the video that you took that day of the dog was likely not that great, if you really feel like its worth \$350 I don't feel like I could argue with that.

However in an effort of good faith I can make a better offer, my neighbor whose worked for you before, named brad norton owes me a favor for web development. I could arrange to have him drive me out to that small studio you mentioned or to the wacom building in vancouver, I could lather on some sunless tanner to get the right complexion you're looking for, and record for a few hours while simultaneously screen capturing it.

I feel that is worth \$350

As for the discrimination aspect, understand it from my POV, my wife is literally albino legally blind and a SPED teacher, and I come from an illiterate jewish family with 7 sibilings. so I dont believe in `white privilege`. me and my wife succeeded against the odds, not because our race but because we refused to ever give up, and we made it our life focus to serve the public good as often as we can.

if you really want diversity, I emlore you to consider the disabled.

On Mon, Jul 28, 2014 at 9:22 PM, Aaron Corpus <[ac@funnelbox.com](mailto:ac@funnelbox.com)> wrote:  
Hi, Ben.

You and I spoke quite frequently at the shoot the other day. Thanks for submitting your invoice. It wasn't till I saw your invoice that I understood how long you were with us that day. Thank you for all your help that day/night.


I will submit your invoice to Accounts Payable.

In addition, in this project, we might use footage showing the artwork you created. If we do end up using that footage, I would like to compensate you \$350 to license that artwork. In the next few days, I would send you a release form seeking your signature. Later on, if that artwork is used in the project, I would be in touch with you to send us a separate invoice for the above amount.


Please get back to me at your earliest convenience.

Thanks much,  
Aaron Corpus


FunnelStripe;

 **Aaron Corpus** | Director/Producer  
o 503.595.5901 | c 503.318.5777 | [www.funnelbox.com](http://www.funnelbox.com)


FunnelStripe;

 **Aaron Corpus** | Director/Producer  
o 503.595.5901 | c 503.318.5777 | www.funnelbox.com

FunnelStripe;

 **Aaron Corpus** | Director/Producer  
o 503.595.5901 | c 503.318.5777 | www.funnelbox.com

FunnelStripe;

 **Aaron Corpus** | Director/Producer  
o 503.595.5901 | c 503.318.5777 | www.funnelbox.com

---

**benjamin barber** <starworks5@gmail.com>  
To: Aaron Corpus <ac@funnelbox.com>

Wed, Aug 13, 2014 at 1:25 AM

On Fri, Aug 8, 2014 at 4:03 PM, Aaron Corpus <ac@funnelbox.com> wrote:  
Hi, Benjamin.

We have your check ready, but need your address. Would you please send that to me, along with the W9 and the Art Release form, at your earliest convenience?

Thanks and have a good weekend,  
Aaron

On Aug 4, 2014, at 2:50 PM, Aaron Corpus wrote:

Hi, Benjamin.

Please see the attached release form allowing permission to use your dog sculpture in the video.  
Please sign and return to me.

If it is used, then I will ask you to submit an invoice for \$350.

AP will process their invoices within 30 days of receipt. So, for you, it would be around Friday, August 22.



I've also attached a W9 form for you to fill out and sign.

Thanks much!  
Aaron

<fw9.pdf>  
<2014\_ArtworkRelease\_Ben\_Barber\_Wacom.pdf>

On Aug 4, 2014, at 1:40 PM, benjamin barber wrote:

Do you know when accounts payable processes their invoices?

On Tue, Jul 29, 2014 at 9:52 AM, Aaron Corpus <[ac@funnelbox.com](mailto:ac@funnelbox.com)> wrote:  
Hi, Benjamin.

We are quite content with the artwork you provided and the footage we shot. As to whether the footage and artwork are included in the final cut is another matter. Lots of footage doesn't make the cut for one reason or another. That's just part of the edit process as we weigh our needs in post-production with the budgeted running time of the video. I'm totally happy and prepared to pay you \$350 for your artwork if it does indeed get used in the project. The release I will send you is my effort to prepare for the possibility of using the footage that features your art. Please keep checking your inbox for that release form. Please read it, ask me any questions, and when all looks good, sign and return it to me.

Your efforts and time were very valuable to us on set that day. We were learning how to be a more efficient on-set as we were going, and I'm happy you were there to assist in that manner. \$350 is fair. I feel strongly about that, so let's keep it at that.

Thank you for telling me about you and your wife. Your drive and service-focus shined through on-set.

Thanks,  
Aaron

On Jul 29, 2014, at 12:07 AM, benjamin barber wrote:

I am not a greedy person, I just thought I spent a little extra time than I expected to, and I wish would have been able to demonstrate my talents. In my work I always put my full effort and attention to the task, and I did try to forward an asian woman I knew, in addition to the japanese american society of oregon, knowing that you were running up against the clock.

I know that maintaining a good reputation and working relationship means fairness, and in fairness I charge my clients for my time, and I open source a great deal of my work for others to use freely. I realize that the video that you took that day of the dog was likely not that great, if you really feel like its worth \$350 I don't feel like I could argue with that.

However in an effort of good faith I can make a better offer, my neighbor whose worked for you before, named brad norton owes me a favor for web development. I could arrange to have him drive me out to that small studio you mentioned or to the wacom building in vancouver, I could lather on some sunless tanner to get the right complexion you're looking for, and record for a few hours while simultaneously screen capturing it.

I feel that is worth \$350

As for the discrimination aspect, understand it from my POV, my wife is literally albino legally

blind and a SPED teacher, and I come from an illiterate jewish family with 7 sibilings. so I dont believe in `white privilege`. me and my wife succeeded against the odds, not because our race but because we refused to ever give up, and we made it our life focus to serve the public good as often as we can.

if you really want diversity, I emlore you to consider the disabled.

On Mon, Jul 28, 2014 at 9:22 PM, Aaron Corpus <[ac@funnelbox.com](mailto:ac@funnelbox.com)> wrote:  
Hi, Ben.


You and I spoke quite frequently at the shoot the other day. Thanks for submitting your invoice. It wasn't till I saw your invoice that I understood how long you were with us that day. Thank you for all your help that day/night.


I will submit your invoice to Accounts Payable.


In addition, in this project, we might use footage showing the artwork you created. If we do end up using that footage, I would like to compensate you \$350 to license that artwork. In the next few days, I would send you a release form seeking your signature. Later on, if that artwork is used in the project, I would be in touch with you to send us a separate invoice for the above amount.

Please get back to me at your earliest convenience.

Thanks much,  
Aaron Corpus

FunnelStripe;  
 **Aaron Corpus** | Director/Producer  
o 503.595.5901 | c 503.318.5777 | [www.funnelbox.com](http://www.funnelbox.com)

FunnelStripe;  
 **Aaron Corpus** | Director/Producer  
o 503.595.5901 | c 503.318.5777 | [www.funnelbox.com](http://www.funnelbox.com)

FunnelStripe;  
 **Aaron Corpus** | Director/Producer  
o 503.595.5901 | c 503.318.5777 | [www.funnelbox.com](http://www.funnelbox.com)

FunnelStripe;

logo

**Aaron Corpus** | Director/Producer  
o 503.595.5901 | c 503.318.5777 | www.funnelbox.com

4 attachments



funnelbox.jpg  
458K



funnelbox\_release.jpg  
900K



funnelbox\_w9.jpg  
1155K



2014\_ArtworkRelease\_Ben\_Barber\_Wacom.jpg  
581K

**Aaron Corpus** <ac@funnelbox.com>  
To: starworks5@gmail.com

Wed, Aug 13, 2014 at 1:25 AM

Hello!

I will be out of the office with very limited email access between 8/11/14 and 8/17/14.

I will return to the office on 8/18/14.

Thanks.

---

**AC** <ac@funnelbox.com>  
To: benjamin barber <starworks5@gmail.com>

Wed, Aug 13, 2014 at 6:44 AM

Thanks Benjamin. I can't see the docs on my iPhone, but I will send them on to accounts payable.

Aaron

Sent from my iPhone 7

On Aug 13, 2014, at 3:25 AM, benjamin barber <starworks5@gmail.com> wrote:

On Fri, Aug 8, 2014 at 4:03 PM, Aaron Corpus <ac@funnelbox.com> wrote:  
Hi, Benjamin.

We have your check ready, but need your address. Would you please send that to me, along with the W9 and the Art Release form, at your earliest convenience?

Thanks and have a good weekend,  
Aaron

On Aug 4, 2014, at 2:50 PM, Aaron Corpus wrote:

Hi, Benjamin.

Please see the attached release form allowing permission to use your dog sculpture in the video.  
Please sign and return to me.

If it is used, then I will ask you to submit an invoice for \$350.

AP will process their invoices within 30 days of receipt. So, for you, it would be around Friday, August 22.

I've also attached a W9 form for you to fill out and sign.

Thanks much!  
Aaron

<fw9.pdf>  
<2014\_ArtworkRelease\_Ben\_Barber\_Wacom.pdf>

On Aug 4, 2014, at 1:40 PM, benjamin barber wrote:

Do you know when accounts payable processes their invoices?

On Tue, Jul 29, 2014 at 9:52 AM, Aaron Corpus <[ac@funnelbox.com](mailto:ac@funnelbox.com)> wrote:  
Hi, Benjamin.

We are quite content with the artwork you provided and the footage we shot. As to whether the footage and artwork are included in the final cut is another matter. Lots of footage doesn't make the cut for one reason or another. That's just part of the edit process as we weigh our needs in post-production with the budgeted running time of the video. I'm totally happy and prepared to pay you \$350 for your artwork if it does indeed get used in the project. The release I will send you is my effort to prepare for the possibility of using the footage that features your art. Please keep checking your inbox for that release form. Please read it, ask me any questions, and when all looks good, sign and return it to me.

Your efforts and time were very valuable to us on set that day. We were learning how to be a more efficient on-set as we were going, and I'm happy you were there to assist in that manner. \$350 is fair. I feel strongly about that, so let's keep it at that.

Thank you for telling me about you and your wife. Your drive and service-focus shined through on-set.

Thanks,  
Aaron

On Jul 29, 2014, at 12:07 AM, benjamin barber wrote:

I am not a greedy person, I just thought I spent a little extra time than I expected to, and I wish would have been able to demonstrate my talents. In my work I always put my full effort and attention to the task, and I did try to forward an asian woman I knew, in addition to the japanese american society of oregon, knowing that you were running up against the clock.

I know that maintaining a good reputation and working relationship means fairness, and in fairness I charge my clients for my time, and I open source a great deal of my work for others to use freely. I realize that the video that you took that day of the dog was likely not that great, if you really feel like its worth \$350 I don't feel like I could argue with that.

However in an effort of good faith I can make a better offer, my neighbor whose worked for you before, named brad norton owes me a favor for web development. I could arrange to have him drive me out to that small studio you mentioned or to the wacom building in vancouver, I could lather on some sunless tanner to get the right complexion you're looking for, and record for a a few hours while simultaneously screen capturing it.

I feel that is worth \$350

As for the discrimination aspect, understand it from my POV, my wife is literally albino legally blind and a SPED teacher, and I come from an illiterate jewish family with 7 sibilings. so I dont believe in `white privilege`. me and my wife succeeded against the odds, not because our race but because we refused to ever give up, and we made it our life focus to serve the public good as often as we can.

if you really want diversity, I emlore you to consider the disabled.

On Mon, Jul 28, 2014 at 9:22 PM, Aaron Corpus <[ac@funnelbox.com](mailto:ac@funnelbox.com)> wrote:

Hi, Ben.

You and I spoke quite frequently at the shoot the other day. Thanks for submitting your invoice. It wasn't till I saw your invoice that I understood how long you were with us that day. Thank you for all your help that day/night.


I will submit your invoice to Accounts Payable.

In addition, in this project, we might use footage showing the artwork you created. If we do end up using that footage, I would like to compensate you \$350 to license that artwork. In the next few days, I would send you a release form seeking your signature. Later on, if that artwork is used in the project, I would be in touch with you to send us a separate invoice for the above amount.


Please get back to me at your earliest convenience.

Thanks much,  
Aaron Corpus


FunnelStripe;

 **Aaron Corpus** | Director/Producer  
o 503.595.5901 | c 503.318.5777 | www.funnelbox.com


FunnelStripe;

 **Aaron Corpus** | Director/Producer  
o 503.595.5901 | c 503.318.5777 | www.funnelbox.com

FunnelStripe;

 **Aaron Corpus** | Director/Producer  
o 503.595.5901 | c 503.318.5777 | www.funnelbox.com

FunnelStripe;

 **Aaron Corpus** | Director/Producer  
o 503.595.5901 | c 503.318.5777 | www.funnelbox.com

| <funnelbox.jpg>



| <funnelbox\_release.jpg>

| <funnelbox\_w9.jpg>

| <2014\_ArtworkRelease\_Ben\_Barber\_Wacom.jpg>

---

**benjamin barber** <starworks5@gmail.com>  
To: Mike Rogoway <mrogoway@oregonian.com>

Fri, Jul 17, 2015 at 10:44 AM

----- Forwarded message -----

From: **Aaron Corpus** <ac@funnelbox.com>  
Date: Tue, Jul 29, 2014 at 9:52 AM  
Subject: Re: Invoicing  
To: benjamin barber <starworks5@gmail.com>

Hi, Benjamin.

We are quite content with the artwork you provided and the footage we shot. As to whether the footage and artwork are included in the final cut is another matter. Lots of footage doesn't make the cut for one reason or another. That's just part of the edit process as we weigh our needs in post-production with the budgeted running time of the video. I'm totally happy and prepared to pay you \$350 for your artwork if it does indeed get used in the project. The release I will send you is my effort to prepare for the possibility of using the footage that features your art. Please keep checking your inbox for that release form. Please read it, ask me any questions, and when all looks good, sign and return it to me.

Your efforts and time were very valuable to us on set that day. We were learning how to be a more efficient on-set as we were going, and I'm happy you were there to assist in that manner. \$350 is fair. I feel strongly about that, so let's keep it at that.

Thank you for telling me about you and your wife. Your drive and service-focus shined through on-set.

Thanks,  
Aaron

On Jul 29, 2014, at 12:07 AM, benjamin barber wrote:

I am not a greedy person, I just thought I spent a little extra time than I expected to, and I wish would have been able to demonstrate my talents. In my work I always put my full effort and attention to the task, and I did try to forward an asian woman I knew, in addition to the japanese american society of oregon, knowing that you were running up against the clock.

I know that maintaining a good reputation and working relationship means fairness, and in fairness I charge my clients for my time, and I open source a great deal of my work for others to use freely. I realize that the video that you took that day of the dog was likely not that great, if you really feel like its worth \$350 I don't feel like I could argue with that.

However in an effort of good faith I can make a better offer, my neighbor whose worked for you before, named brad norton owes me a favor for web development. I could arrange to have him drive me out to that small studio you mentioned or to the wacom building in vancouver, I could lather on some sunless tanner to get the right complexion you're looking for, and record for a a few hours while simultaneously screen capturing it.

I feel that is worth \$350

As for the discrimination aspect, understand it from my POV, my wife is literally albino legally blind and a SPED teacher, and I come from an illiterate jewish family with 7 sibilings. so I dont believe in `white privilege`. me and my wife succeeded against the odds, not because our race but because we refused to ever give up, and we made it our life focus to serve the public good as often as we can.

if you really want diversity, I emlore you to consider the disabled.

On Mon, Jul 28, 2014 at 9:22 PM, Aaron Corpus <[ac@funnelbox.com](mailto:ac@funnelbox.com)> wrote:  
Hi, Ben.

You and I spoke quite frequently at the shoot the other day. Thanks for submitting your invoice. It wasn't till I saw your invoice that I understood how long you were with us that day. Thank you for all your help that day/night.


I will submit your invoice to Accounts Payable.

In addition, in this project, we might use footage showing the artwork you created. If we do end up using that footage, I would like to compensate you \$350 to license that artwork. In the next few days, I would send you a release form seeking your signature. Later on, if that artwork is used in the project, I would be in touch with you to send us a separate invoice for the above amount.


Please get back to me at your earliest convenience.

Thanks much,  
Aaron Corpus

FunnelStripe;

 **Aaron Corpus** | Director/Producer  
o 503.595.5901 | c 503.318.5777 | [www.funnelbox.com](http://www.funnelbox.com)

FunnelStripe;

 **Aaron Corpus** | Director/Producer  
o 503.595.5901 | c 503.318.5777 | [www.funnelbox.com](http://www.funnelbox.com)



Faye Bridge

*writes on June 18, 2014*



Treehouse are proud to announce the launch of [Code Oregon](#), an exciting new partnership between [Worksystems](#) and Treehouse to fill the growing number of tech jobs in Oregon. By 2020, there will be an estimated one million more computer programming jobs in the U.S. than workers to fill them, and 10,000 of those will be in the Portland metro region. To prepare locals with the skills needed to fill the new job opportunities, Treehouse has teamed up with Worksystems – the workforce investment board for the City of Portland, Multnomah and Washington Counties – to help build the region’s future technology workforce through the [Code Oregon](#) initiative.

***“We want to start the Code-to-Work movement, which will take someone from no experience, to job-ready, to a rewarding career – all without a degree and zero experience. The rules are all***

***changing. You just don't need a  
Computer Science degree any more to  
get an amazing job in the tech  
industry.” Ryan Carson, co-founder  
and CEO of Treehouse.***

Code Oregon will help prepare and guide the next highly skilled and enthusiastic designers and developers towards filling the huge number of jobs that are being created. Treehouse will provide the quality online training that teaches high-demand programming languages, including iOS, Android, HTML, CSS, WordPress, PHP, Python, JavaScript, Ruby, and more. Top students will then be identified and WorkSource will provide them with career services, mentoring, and additional training needed to guide them through the next steps towards being job-ready. This Fall, Treehouse and Worksystems will also host a 2014 Jobs Fair, where leading tech companies will interview qualified students for internships, mentoring, and junior developer positions.

If you're interested in an exciting new career in the tech industry, take the first step towards making it happen by signing up to [Code Oregon today!](#)

**What? No Boys or Girls Allowed?!**

Perkins Nontraditional Occupations  
Demonstration Grant Application, Supplemental Questions  
May 2011  
Page 1 of 6

**Project Overview**  
**What? No Boys or Girls Allowed?**

- 1) How does this project encourage the successful recruitment and retention of students (*nontraditional by gender*) within a CTE Program of Study that leads to an occupation that is nontraditional by gender?**

For several years now the Mid-Willamette Education Consortium or MWECC has helped support No Boys Allowed (NBA) at North Salem High School through this same grant process provided for through the Oregon Department of Education and later through MWECC funding.

NBA is a highly successful middle school girl recruitment and retention model based out of North Salem High School that focuses on Computer Science, Engineering, Robotics, and Wood Technology. It is facilitated by Don Kirkwood and his team of North Salem staff and student leaders. Never have I personally witnessed a more successful model aimed at the needs of non-traditional occupations. The number of female students in these programs at NSHS is now above 30%. Research has shown that in the area of engineering, if students do not declare engineering as their major upon entry to college there is very little likelihood that they will choose it after beginning their college career. Recruitment at early stages is key to getting kids interested in these types of high technology programs of study.

The basic concept of NBA is a three phased approach and is implemented once a student leadership team is in place. The design facilitates the placement of student leaders and helpers into positions based on their interests and strengths. Most of the female students are former NBA participants and just as many male students are motivated by the concept, passion, and vision brought by NBA teaching staff. With a core leadership team in place made up mostly of these diverse students and key North Salem teachers, the planning begins.

**Phase I:**

Called "Flash and Dash" this phase involves student leaders going to area middle schools and presenting a brief DVD (see enclosed NBA 2010-11) on the highlights of the latest NBA event with student leaders following up with their own passionate accounts of the fun and personal enrichment. At the conclusion of the presentation they take sign-ups from 7<sup>th</sup> and 8<sup>th</sup> grade girls.

**Phase II:**

This is the actual "NBA" event and during this day middle school girls are invited to come and participate in a variety of high energy tech@north workshops. Topics covered are **computer networking** (the girls make network cables and come to understand how computers can communicate between themselves), **CAD** (the girls design 3-D pictures and print them out), **robotics** (the girls program and manipulate robots) and **computer programming** (the girls write code to create pictures and even animation). Each participant receives a t-shirt designed by the NBA leadership team and a chance to win prizes, including computers and other technology.



**What? No Boys or Girls Allowed?!**

Perkins Nontraditional Occupations  
Demonstration Grant Application, Supplemental Questions  
May 2011  
Page 2 of 6

Everyone is pulled together at the conclusion of the workshops for a pizza party as they listen to a former NBA alum that has been successful in the field of computer technology or engineering.

**Phase III:**

The final stage is “registering” middle school 8<sup>th</sup> grade girls and is essential in the follow-up for technology courses at North Salem. This involves teachers and student leaders from the NBA program that go to the same area middle schools and help former NBA participants decide to register for technology-related classes within a program of study (POS).

After nine annual NBA’s this event has proven to increase the number of girls in Computer Science and provides retention well into high school and beyond. In just the last five years the rate of girls in technology programs of study at NSHS increased from 15% to just over 35% during the 2010-11 school year. In addition, the overall numbers of both male and females in the technology programs has doubled to over 300.

Using the same successful NBA model outlined above our plan is to develop a regional approach that can be replicated statewide. Our focus this next school year is to provide a series of teacher/facilitator trainings, to produce materials, and to strengthen community college connections in two other areas of the region in order to duplicate a NBA-type event. Our two focus areas will be “girls in engineering and computer science” in Yamhill County (in partnership with the Project Lead the Way based Evergreen STEM Institute at the Evergreen Space Museum) and “boys in nursing” in North Marion County. The goal will be to use the experience and expertise Don Kirkwood has gained over the past nine years to make the same vision a reality in more rural areas of the region.

This is a “big picture” vision that lays the foundation for future nontraditional program of study growth across our region and potentially the state. Not only will we implement a strategy to increase our nontraditional percentages for our region (since we did not meet the performance indicator for Perkins IV in 2009-10), but we will increase recruiting and retention rates at both the high school and college levels as students learn what is available *for them past high school* in their chosen program of study.



## Which Countries Have the Most Female Developers?

682  
SHARES



*Update: This article was picked up by [Fast Company](#) and [Business Insider](#)*

It's no secret that there's a gender gap in coding.

Women make up [less than a third](#) of the tech talent pool in Silicon Valley. At [Google](#) and [Facebook](#), women make up just 17% and 15% of technical positions.

One of the problems could be that recruiters look for talent in the same places — MIT / Stanford — leading to bidding wars for pedigreed candidates and the illusion of a skills shortage, especially among underrepresented groups. When, actually, companies are overlooking thousands of qualified female developers simply because they don't look good on paper.

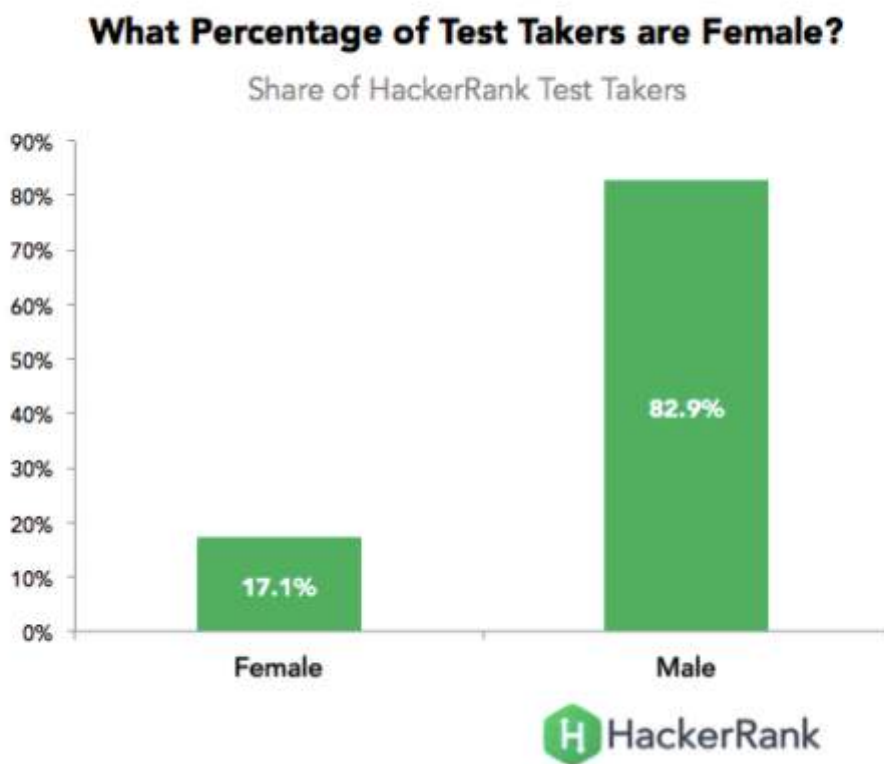
We were curious to find out: Where do the best female developers live? We decided to analyze our data of 2M+ developers.

At HackerRank, [we create coding challenges to help find top talent](#) and help developers get jobs. Hundreds of thousands of developers from all over the world participate in challenges in a variety of programming languages and knowledge domains, from Python to artificial intelligence to distributed systems.

About 17% of people who have solved HackerRank coding challenges are female. According to our data, India and Italy have the highest percentage of female developers, while women from Belarus, China and Russia score the best. We also found that female developers are unusually likely to take our Java challenges, and are not drawn to our challenges on security or artificial intelligence.

\*\*\*

We began our analysis with an attempt to assess exactly how many HackerRank test takers are female. Though we don't collect gender data from our developers, we were able to assign a gender to about 80% of developers based on their first name. (We did not include first names with equal gender distributions, such as Taylor or Riley.)



The vast majority – 82.9% – of developers on HackerRank are male. Though the gender balance is far from equal, it's a significantly more balanced than the 5.8% female StackOverflow survey result.

Next, we looked for trends within countries. Below is a breakdown of the share of female developers from each of the top 50 countries with the most developers on HackerRank. For each of these countries, thousands of developers have participated in a HackerRank challenge.

## Which Country Has the Largest Proportion of Female Developers?

Share of HackerRank Tests

Rank	Country	Female	Rank	Country	Female
1	India	22.9%	26	France	9.4%
2	United Arab Emirates	21.0%	27	Switzerland	9.0%
3	Romania	20.6%	28	Egypt	8.9%
4	China	19.6%	29	Netherlands	8.3%
5	Sri Lanka	19.0%	30	Greece	8.3%
6	Italy	16.7%	31	Belarus	7.8%
7	Bulgaria	16.5%	32	Russia	7.8%
8	Singapore	15.2%	33	Spain	7.4%
9	Philippines	15.1%	34	Germany	7.4%
10	Indonesia	15.0%	35	Portugal	7.2%
11	United States	14.8%	36	Turkey	6.7%
12	New Zealand	14.6%	37	Colombia	6.5%
13	Malaysia	14.4%	38	Pakistan	6.5%
14	Hong Kong	13.8%	39	Mexico	6.3%
15	South Korea	13.6%	40	Venezuela	6.3%
16	Israel	12.9%	41	Belgium	6.0%
17	Japan	12.8%	42	South Africa	5.9%
18	Ukraine	12.6%	43	Brazil	5.8%
19	Bangladesh	11.9%	44	Sweden	5.7%
20	Canada	11.4%	45	Austria	5.4%
21	Vietnam	11.3%	46	Hungary	5.0%
22	Australia	10.7%	47	Argentina	4.5%
23	United Kingdom	10.3%	48	Czech Republic	4.5%
24	Poland	10.2%	49	Denmark	3.3%
25	Ireland	9.7%	50	Chile	2.9%



Russia's female developers, who only account for 7.8% of Russian HackerRank developers, top the list with an average score of 244.7 on algorithms tests.

Russia is closely followed by its European counterparts in Italy and Poland. Though India has the largest share of female developers, they rank 18th, with a middling average score of 146.2 points.

\*\*\*

So what does looking abroad teach us about the gender gap in coding?

For starters, we see further evidence that the United States, which ranks 11th in terms of percentage of female developers and should improve...especially in regards to Java development. In comparison, women in India are growing up with coding stitched a little closer into their culture.

But we also see an encouraging sign for women who find themselves working in a male-dominated industry. Relatively few women in Belarus, China, and Russia participate in coding challenges. But their female developers—despite these challenges—are still crushing it.

...

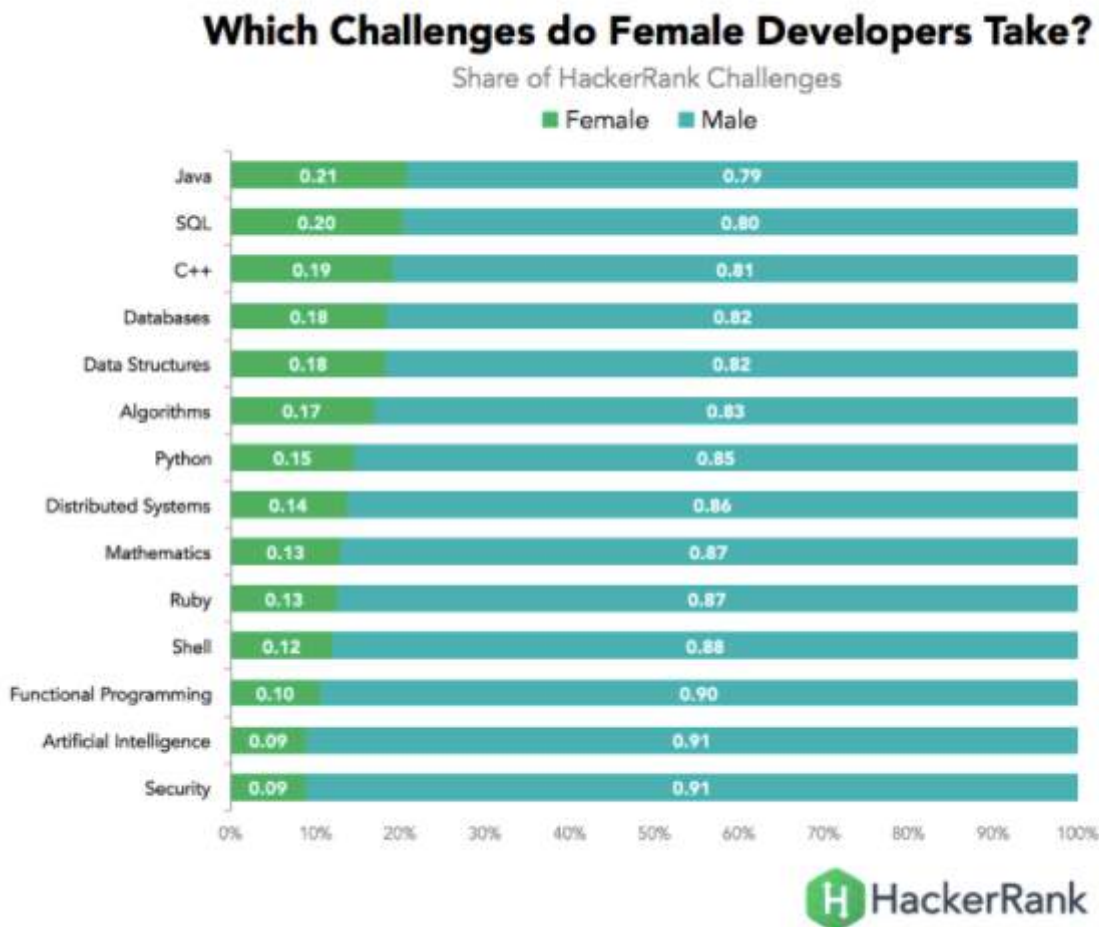
*Is diversity hiring one of your goals?  
Learn how to find more female developers.*

...

India, which contributes nearly 40% of HackerRank's developers, leads the pack with about 23% female developers. Experts have [found](#) that India's education and tech industry culture is more conducive to gender equality in computer programming.

The United States, the second largest contributor of developers, falls just shy of the top 10 with 14.8% female developers. Chile had the lowest representation of women, with fewer than 3% female developers.

When women do take our challenges, which computer programming domains are they particularly drawn to? The chart below shows the percentage of female test takers for each of our challenges.



Women account for 21% of developers in tutorial and Java challenges. The tutorials domain includes our [30 Days of Code Challenge](#), which is heavily Java-based. Women spend the least time on artificial intelligence and security challenges.

...

***Looking to hire more female developers?***  
***[Learn more about skills-based hiring to boost diversity.](#)***

...

So, does more female developers mean better female developers?

We looked at women's average scores on algorithms challenges (which account for more than 40% of all HackerRank tests taken) to find out. Algorithms challenges include sorting data, dynamic programming, searching for keywords, and other logic-based tasks. Scores typically range from 0 to 115 points. We examined the 20 countries with the most female developers in order to have large sample sizes.

## Which Country Has the Best Female Developers?

Average HackerRank Score on Algorithms Tests  
(Scores Range 0-10,000)

Rank	Country	Avg. Score
1	Russia	244.7
2	Italy	235.8
3	Poland	230.1
4	China	197.9
5	France	194.3
6	Romania	164.9
7	Germany	151.2
8	Singapore	147.8
9	India	146.2
10	United Kingdom	140.0
11	Ukraine	137.8
12	Canada	129.6
13	Australia	127.5
14	United States	121.2
15	Indonesia	115.0
16	Egypt	105.1
17	Sri Lanka	97.3
18	Brazil	95.7
19	Mexico	85.7
20	Philippines	79.9



Russia's female developers, who only account for 7.8% of Russian HackerRank developers, top the list with an average score of 244.7 on algorithms tests.

Russia is closely followed by its European counterparts in Italy and Poland. Though India has the largest share of female developers, they rank 18th, with a middling average score of 146.2 points.

\*\*\*

So what does looking abroad teach us about the gender gap in coding?

For starters, we see further evidence that the United States, which ranks 11th in terms of percentage of female developers and should improve...especially in regards to Java development. In comparison, women in India are growing up with coding stitched a little closer into their culture.

But we also see an encouraging sign for women who find themselves working in a male-dominated industry. Relatively few women in Belarus, China, and Russia participate in coding challenges. But their



female developers—despite these challenges—are still crushing it.

Eventbrite

Search for events

Browse Events

Sign up

Log in

Help ▾

CREATE EVENT



Your session has expired. Try ordering again.

## WITCH Women in Tech Summer Soirée

Women in Technology, Coding, and Hacking (WITCH)  
 Thursday, July 16, 2015 from 5:30 PM to 8:30 PM (PDT)  
 Portland, OR



### Ticket Information

TYPE	END		QUANTITY
Attendee	1d 1h 11m	Free	1 ▾

[Register](#)**Save This Event**

10 people have saved WITCH Women in Tech Summer Soirée

Share WITCH Women in Tech Summer Soirée

[Email](#)[Share](#)[Tweet](#)

### Event Details

The **Women in Technology, Coding, and Hacking** (WITCH) second event will be held on July 16th at the Jaguar Land Rover R&D Labs in NW Portland. These events give us the opportunity to share our experiences, make new friends, provide informal mentorship, and strengthen Portland's community of women in technology. Come celebrate summer with snacks and drinks, network, learn about all the groups serving women in computing and technology in PDX, and hatch fun plans for future collaborations!

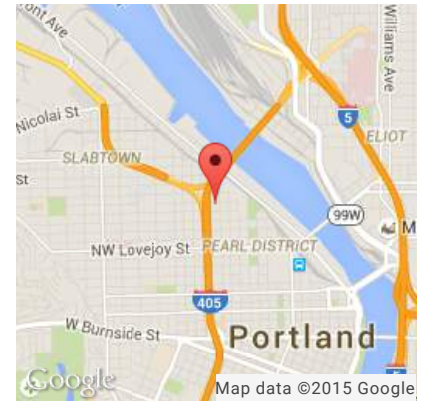
Doors will open at 5:30, and at 6:00pm we'll have a quick welcome by organizing groups and sponsors. Food and drinks will be provided, so please RSVP so we can plan accordingly. Looking forward to seeing everyone there!

WITCH is a collaboration of the Portland women in tech groups. It was created to bring our members together to cross-pollinate and provide support to all. Our first event, a holiday happy hour, was a great success and we're excited to make this a biannual event.

### Sponsored by:



### When & Where



#### Jaguar Land Rover R&D Offices

1419 NW 14th Ave  
 Portland, OR 97209

Thursday, July 16, 2015 from 5:30 PM to 8:30 PM (PDT)

[Add to my calendar](#)

### Organizer

#### Women in Technology, Coding, and Hacking (WITCH)

WITCH is a collaboration of Portland organizations representing over 2000 women in technology.

[Jaguar Land Rover](#)



[Worksystems Inc](#)

**Organizing groups:**

**Lesbians**  
who **Tech**  
Queer Women In Tech

[Lesbians Who Tech](#)



[ChickTech](#)

**Girl Develop It**  
*don't be shy. develop it.* 

[Girl Develop It](#)

WOMEN WHO  
**CODE**  
PORTLAND

[Women Who Code](#)

 **Contact the Organizer**

 [View organizer profile](#)

1 [upcoming event on Eventbrite](#)

WITCH Women in Tech Summer  
Soirée

Portland, OR Events

Networking

Science & Tech

The logo for Django Girls, featuring the text "django girls" in a white, lowercase, sans-serif font on a green rectangular background.

[Django Girls](#)



[PDX Women in Tech](#)



[App Camp for Girls](#)



[Women Who Hack](#)

Have questions about WITCH Women in Tech Summer Soirée?  
[Contact Women in Technology, Coding, and Hacking \(WITCH\)](#)

Attendee List

Sort by: **Date** | First Name | Last Name

benjamin b, nerdparty

Lora G, Self-employed

Jessica C, Portland State University

Monique T, Treehouse  
Julie W, The Art Institute of Portland  
Ryan K, consultant  
Daviann D, Intel  
Brittaney C, Computer Action Team - PSU/MCECS  
Alley H, Motivate  
Gina C, Clinic HQ  
Denise B, PSU  
perry e, Freelance Developer  
Becca P, GlobeSherpa  
Danielle H, CDK Global  
Nomira H, Portland State University  
Crystal C, Portland State University  
Katy B, Portland State University  
Nikki K, Portland State University  
momoko s, app camp for girls  
Emily K, Neologic Labs  
Elizabeth H, CDK Global  
Nirupama B, Portland State University  
Nerissa L, AppNexus  
Tracey H, State of Oregon  
Ariel S, :)  
Jeanette F, Epicodus/Thetus  
Karenn W, Portland State University  
Samantha N, Cascade Microtech  
Raina D, 211info  
JoAnna L, FamilyCare Health  
Delilah M, KPNW  
Laura L, Sitka Technology Group  
Almarose R, Kpa  
Kate K, Rentrak  
Tara H, The Praxis Department  
Alison N, Portland State University  
Rubyna B, Rentrak  
Kathryn B, GirlTalk Marketing  
Alissa Y, CMD  
Jennifer J, Student  
Eleanor P, Reed College Student  
Cordelia M, Hands On Medicine  
Sharon S, Sharon Smith Design & Metal Arts  
Amye S, Amye.org  
Allison D, Oregon Children's Theatre  
Arleigh H, Girls Inc.  
Chikeola K, Soul Beauty Living  
Evie S, Matter Communications  
Lauren H, Matter Communications  
Erin B, Matter Communications  
Cait B, Matter Communications  
Tonya E, Matter Communications  
J. T, self  
Art M, Jaguar Land Rover.  
Amy J, Student  
Allie K, GreenSparrow PDX  
Bobbi Raine H, SalesIgnited  
Cait R, Video Production Geek  
Victoria W, Neocities  
Kegan S, PSU - Student  
Bojana S, ThinkShout  
Cynthia P, Free Geek  
jennifer c, Girls Inc

Claire b, O'Gara Motorsport  
Erica M, Intel  
Cat P, OSH Park  
Cee W, Dapper Digital  
Lauren M, Unemployed  
Sabrina V, Worksystems Inc  
Corrinna G, TriMet  
Stephanie K, LAIKA Entertainment  
Farrah C, RipFog  
Ingrid C, Con-way Enterprise Services  
Mikaela E, Tuna Traffic & Self-Employed  
Jocelyn b, intel  
Tara H, Salesforce.com  
Stacy C, SRC Consulting  
Jill K, Emerge Interactive  
Carrie B, N/A  
Layne M, LegitScript  
Michelle H, CBHC  
SAra P, CatalystIT  
Laure P, Olark  
Sarah B, Sarah Bagley Web Design  
Brit Y, Independent/PM  
Catherine A, Azzcat Design  
Paige H, Women Who Code  
Melisa M, C0dette  
Karen M, UW - Madison  
Theresa C, student  
Sarah R, OHSU  
Courtney R, Lantana  
Jaime P, vacasa  
Cynthia W, Intel  
Shawna V, Independent Consultant  
Jennifer W, Radius  
Lacey W, Django Girls  
Katy O, VintagePDX  
Jenny O, n/a

[Show More](#)

## Interested in hosting your own event?

Join millions of people on Eventbrite.

[LEARN MORE](#)

Use Eventbrite for event ticketing and online registration

©2015 Eventbrite | [About](#) | [Terms](#) | [Privacy](#) | [Help Center](#) | [Cookie Policy](#)

Already registered? [Get your tickets](#)

Questions? [Contact the organizer](#)



# WORKSYSTEMS RECEIVES \$6M GRANT FOR WORKFORCE TRAINING!

NOVEMBER 18TH, 2016

An influx of training resources is heading to the Portland Metropolitan region to help under-served populations prepare for careers in health care.

The Columbia-Willamette Workforce Collaborative (CWWC), a partnership between Clackamas Workforce Partnership, Workforce Southwest Washington and Worksystems, has been awarded a \$6 million grant that will train and place historically under-represented populations into health care occupations with a solid career path. Long-term unemployed, people of color, English language learners, people with disabilities, low-income residents, and other populations facing barriers to employment will be a focus for the training resources.

"The current health care workforce does not reflect the nation's diversity," said Brian Gibbs, Ph.D., M.P.A., OHSU, Vice President of Equity and Inclusion, Center for Diversity & Inclusion. "With the support of this funding, we can begin to cultivate and access regional workforce pipelines that both mirror and resonate with a broader patient population, and helps to improve overall patient care experience in Oregon and beyond."

The CWWC is joined by leaders from the five largest health systems (Kaiser Permanente, Legacy Health, Oregon Health & Sciences University, PeaceHealth and Providence Health & Services), the Oregon Nurses Association, SEIU Local 49, and others who are working together to advance health equity, improve patient care quality and eliminate health care disparities. Increasing workforce diversity in the health care field is seen as an important contributor to these goals.

Specific outcomes for the grant include:

1. Fund health career education for more than 800 local community members of color, immigrants and refugees, and people with disabilities;
2. Provide the culturally-competent coaching, supportive and training services necessary to help this new pipeline access and persist through postsecondary education programs;
3. Deliver mentorship and peer networking services; and
4. Fund the development and delivery of cultural-competency training to hiring managers so that placed participants can optimally succeed, persist and advance.

## About the America's Promise Grant

The America's Promise grants will help develop and grow regional partnerships between workforce agencies, education and training providers and employers in a variety of industries.

The America's Promise grant competition was designed to:

- Increase opportunities for all Americans through tuition-free training for middle-to high-skilled occupations and industries.

- Expand employer involvement in the design and delivery of training programs.

- Utilize evidence-based sector strategies to increase employability, employment earnings, and outcomes of job seekers.

- Leverage additional public, private, and foundation resources to scale and sustain proven strategies.

Funded through fees paid by employers to bring foreign workers into the U.S. under the H-1B temporary visa program, these grants are intended to raise the technical skill levels of American workers and, over time, help businesses reduce their reliance on temporary visa programs.

## Portland Housing Bureau

Solving the unmet housing needs of the people of Portland.

Phone: 503-823-2375 fax: 503-823-2387 421 SW 6th Avenue, Suite 500, Portland, OR 97204

More Contact Info (<http://www.portlandoregon.gov/phb/article/433750>)

## Women Into Housing Now Initiative Underway



Portland Housing Bureau's

Director Traci Manning joined Multnomah County Commissioner Deborah Kafoury; Sharon Singleton, Day Shelter House Manager at JOIN (<http://www.joinpdx.com/>); and Keith Thomajan, CEO of United Way of the Columbia Willamette (<http://www.unitedway-pdx.org/index.php>) to give a presentation to Portland City Council on new funds for the Women Into Housing Now (WIHN) initiative.

WIHN is a special allocation of \$300,000 to assist 92 women experiencing homelessness to find permanent homes. The program will support women as they gain and maintain housing stability through rent assistance, street outreach, shelter diversion and housing placement. The funds will help to shorten shelter stays and free up capacity in existing shelters.

This is the result of a longstanding partnership with Multnomah County and our partners who deliver services to women experiencing homelessness: Human Solutions (<http://www.humansolutions.org/>), JOIN, Northwest Pilot Project (<http://www.nwpilotproject.org/>) and Transition Projects (<http://www.tprojects.org/>). This new funding, and an upcoming ask of the Council for an additional \$1.7 million for to reduce homelessness, is the result of our community's 10 Year Plan to address homelessness, "A Home For Everyone".

These additional funds will provide an array of services aimed at reducing shelter waitlists, providing permanent housing placements and services for women.

## 2015 ORS 30.860<sup>1</sup>

### Action for trade discrimination

- treble damages
- attorney fees

- (1) A person or governmental entity may not discriminate against, boycott, blacklist or refuse to buy from, sell to or trade with any person because of foreign government imposed or sanctioned discrimination based upon the race, religion, sex, sexual orientation or national origin of the person or of the person's partners, members, directors, stockholders, agents, employees, business associates, suppliers or customers.
- (2) Any person directly injured in business or property by a violation of subsection (1) of this section may sue whoever knowingly practices, or conspires to practice, activities prohibited by subsection (1) of this section, and shall recover threefold the damages sustained. The court shall award reasonable attorney fees to the prevailing plaintiff in an action under this section. The court may award reasonable attorney fees and expert witness fees incurred by a defendant who prevails in the action if the court determines that the plaintiff had no objectively reasonable basis for asserting a claim or no objectively reasonable basis for appealing an adverse decision of a trial court. [1977 c.395 §1,2; 1981 c.897 §9; 1995 c.618 §28; 2007 c.100 §15]

---

<sup>1</sup> Legislative Counsel Committee, *CHAPTER 30—Actions and Suits in Particular Cases*, [https://www.oregonlegislature.gov/bills\\_laws/ors/ors030.html](https://www.oregonlegislature.gov/bills_laws/ors/ors030.html) (2015) (last accessed Jul. 16, 2016).